Introduction

In a 1962 radio address Pope John XXIII said: “Confronted by the underdeveloped countries, the Church presents herself as she is and wants to be: the Church of all men, (sic)\(^1\) and in particular the Church of the poor.\(^2\) While the Pope did not initially offer any specific theological, biblical, ecclesial, or pastoral framework for the realisation of such a Church, there was evidence that this ecclesial challenge had some bearing on the deliberations of the Second Vatican Council (1962-1965).

We shall not meet the truest and deepest demands of our times; we shall not answer the hope of unity shared by all Christians, if we do no more than make the preaching of the Gospel to the poor one of the many themes of the Council. In fact, it is not a theme; it is in some measure the theme of the Council. If, as has often been repeated here, it is true to say that the aim of this Council is to bring the Church into closer conformity with the truth of the Gospel and to fit her better to meet the problems of our day, we can say that the central theme of this Council is the Church precisely in so far as she is the Church of the poor.\(^3\)

There were a number of post Vatican II responses to this papal challenge and it will be my contention that these responses would become the major contributors to the formulation and development of the Church’s teaching known as the preferential option for the poor. The CELAM\(^4\) Conferences at Medellín, Colombia (1968), and Puebla, Mexico (1979); the emergence of liberation theology; the more recent ecclesial renewal proposed by Pope Francis, and the growing catalogue of Catholic Social Teaching (CST) will be critiqued in

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\(^1\)Throughout the course of this thesis there will be many quotes, including those from official Catholic Church documents that do not use inclusive language. The original quotes will be used but they express the author’s historical style and not my own.


\(^4\) CELAM is an acronym for the Conference of Latin American Bishops.
relation to their contribution to the Catholic Church’s teaching on the preferential option for the poor.

CST is the official teaching of the Catholic Church as presented by the Magisterium.\(^5\) It is an evolving body of work whereby each new document makes reference to its predecessors but also allows for new biblical, philosophical and theological insights to influence its content. The documents of CST display a capacity to adapt to changing historical contexts and therefore exhibit both continuity and innovation. Throughout the history of CST there has been a consistent challenge to society to protect and care for the poor. CST does not propose any specific political or economic theory but it does represent the Church’s documented attempt to bring gospel values to bear on the social and economic lives of all peoples. CST contains an underpinning optimism which argues that reasonable people of goodwill can sufficiently agree upon ethical principles that contribute to order, peace, justice and harmony in society.

Despite the teaching on the preferential option for the poor being a component of CST, its major contributors were the CELAM Conferences at Medellín and Puebla, and the liberation theology of Gustavo Gutiérrez. In fact, the term “option for the poor” is synonymous with liberation theology.\(^6\) Liberation theology emerged in the late 1960s in the poorer nations of Latin America so it had specific historical and contextual origins. It sought ways of speaking about God’s love in the midst of the poverty and injustice that pervaded Latin America.

\(^5\) The Magisterium is the official and authoritative teaching body of the Catholic Church and consists of the Pope and Bishops. Its role is to safeguard the integrity and authenticity of Church teaching.

\(^6\) Gustavo Gutiérrez wrote: “If it were possible to quantify qualitative things, I would say that the preferential option for the poor forms 90 percent of liberation theology. This theology arises from the intention and goal to take seriously the challenge coming from poverty, the challenge to human consciousness, and, especially, the challenge to Christian consciousness.” “Liberation Theology in the Twenty-First Century,” in *Romero’s Legacy: A Call to Peace and Justice*, ed. Pilar Hogan Closkey and John Hogan (Lanham MD: Rowman & Littlefield, 2007), 45.
Liberation theology was, and is, both a praxis and communal theology. Liberation theology allows history to be a locus for theological reflection and for these reflections to help articulate a new theological narrative. As a praxis theology it is formed and informed by historical engagement; an engagement that is undertaken in the light of faith.

On his election as Pope in 2013, Francis recalled the idea of a Church of the poor and has initiated an ecclesial renewal that offers a framework for the realisation of such a Church. Pope Francis’ renewal is an acknowledgement that Pope John XXIII’s initial challenge, despite a promising start, as is evidenced in the CELAM documents from Medellín and Puebla, and the emergence of liberation theology, failed to gain traction. The Church as a “Church of the Poor” remains an unrealised and somewhat controversial objective.

This research project will present an argument that states that:

1. The teaching on the preferential option for the poor is an official teaching of the Catholic Church and as such needs to be effectively understood and applied by the various institutions and communities that represent the Church.

2. Liberation theology was the major contributor to the formulation and early development of the teaching and that utilisation of the more fruitful aspects of liberation theology could be beneficial when seeking to understand and apply the teaching.

3. That liberation theology is not the only contributor to the teaching and that the Church needs to develop ever new methodologies of promoting and disseminating the teaching throughout the Catholic world and beyond.

4. The preferential option for the poor is a theological teaching. The practise of this preferential option displays not only a commitment to Church teaching, but more
importantly an authentic witness to the life and mission of Jesus Christ. Fidelity to the teaching is a sign of our authentic discipleship.

There are two important premises which are foundational to this thesis. The first is that poverty is defined as a moral, rather than economic problem. While economics can play a role in both the perpetuation and/or alleviation of poverty, its prolificacy and continuity deem it a moral issue. As a moral issue that impacts vast numbers of people, poverty challenges the Church to investigate its theological implications and poses the questions of what God would say to the poor and concomitantly to the non-poor. While the teaching on the preferential option for the poor represents the Church’s concern for the poor, the teaching should be primarily understood as an option grounded in the mission of Jesus Christ as illustrated in the Gospel. It is for this reason that the teaching resides in the realm of moral theology.

The second premise is that there is a correlation between social justice and salvation. The theocentric nature of the preferential option for the poor should ensure that the teaching extends beyond the realm of any ethical theory or call to living an individual moral life. It is a teaching that should be evident in all components of the Church’s ecclesial structures. This evidence will include theological and scriptural teachings that bear witness to the teaching as central to the Church’s identity and mission.

While this research project will argue that liberation theology was the major contributor to the formulation and development of the teaching of the preferential option for the poor, it will also argue that one does not need to be a liberation theologian to understand and apply
the teaching. The dissertation will claim that the teaching can be grounded in scriptural, experiential, and other theological sources that need not rely on some of the more controversial methodologies employed by the original liberation theologians. I would immediately qualify this statement by arguing that prior to the election of Pope Francis in 2013, it was only liberation theology that had provided the Catholic Church with an effective theological framework in which the teaching could be understood and applied.

The methodology employed by this research project will focus on an assessment of the contribution that the official documents of CST have made in relation to the teaching on the preferential option for the poor. The examination will trace the historical journey of the teaching from its origins up until the current day. While this examination begins well before the emergence of liberation theology it will allow for an interpretation of how CST understood the Church’s commitment to the poor both pre and post the formulation of the teaching.

The Medellin Documents and liberation theology are a necessary study in this dissertation for they are the primary formulators of the teaching that would eventually become the preferential option for the poor. Liberationist themes will continue throughout the thesis as its own maturation continued to offer insights into the understanding and application of the teaching.

Despite references to episcopal appointments, historical contexts, theological, ecclesial and philosophical debates, this research project seeks to look at the Church’s historical response

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7 Throughout the course of this thesis I will refer to the understanding and application of the preferential option for the poor. The two are intricately linked. An understanding of the teaching includes concrete practices (applications) which then lead to a deeper understanding and new applications. The teaching of the preferential option for the poor is dialectical.

8 The initial controversies related to liberation theology’s methodology will be explored in Chapter Two.
to the poor via its social teaching. The documents published by each Pope will be analysed in relation to their contribution to the teaching on the preferential option for the poor.

Following the introduction there will be six chapters, and a conclusion

Chapter One will cover the historical timeframe from 1891 through to 1980. Its title is: **The Formulation of the Teaching on the Preferential Option for the Poor**. This chapter will set the foundations for the various directions that the teaching would historically take. Later chapters will refer to these foundational positions.

The major dialogue partners in the chapter will be CST, the liberation theology of Gustavo Gutiérrez and the CELAM Conferences of Medellín and Puebla. While the chapter focusses on the teachings formulation, I can offer no definitive date for its “birth.” In fact, my argument will be that the two most significant contributors to the teachings formulation were the Medellín Conference and Gustavo Gutiérrez’s seminal work *A Theology of Liberation* and neither used the phrase “the preferential option for the poor.” The chapter will include a brief account of the life of Saint Oscar Romero. Romero will be presented as an example of someone who practised a preferential option for the poor in the liberationist tradition; a practice that ended in violence and created tension within the local and universal Catholic Church.

Chapter Two will investigate the period from 1980 to 1988 and is named: **The Preferential Option for the Poor: An Uncertain Position**. While I acknowledge that the expression

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9 Gustavo Gutiérrez, *A Theology of Liberation* (Maryknoll, NY: Orbis Books, 1988). The version of *A Theology of Liberation* used in this research project is the 15th anniversary publication of 1988. The text was originally published in Spanish in 1971 and English in 1973. The fifteenth anniversary edition did not alter the main text but it contained a new and expanded introduction. There will be a number of texts used throughout this thesis that were originally published in Spanish. My own linguistic limitations deem it impossible to quote these original texts but given there is no evidence of complaint from the original authors I will assume that the translations are a faithful representation of the initial texts.
preferential option for the poor is evident in Catholic vocabulary during the 1970s, it will be my argument that the 1984 Magisterium document *Instruction on Certain Aspects of the Theology of Liberation*\(^{10}\) established it as official Church teaching. Ironically, it was this same document that saw the Catholic Church hierarchy methodically detach the teaching on the preferential option for the poor from its liberationist origins. While the reasoning behind the Vatican’s decision to implement this detachment process will be explored, the crucial question that this research project will investigate is what direction the teaching would take, now that it was extricated from its original theological framework? Having officially incorporated the teaching into the corpus of CST, it was incumbent upon the Vatican to introduce a framework by which the preferential option for the poor could be understood and applied throughout the Church. If liberation theology was not to be that framework, what criterion would they introduce? In relation to the teaching on the preferential option for the poor, this was a time of great uncertainty.

Chapter Three will concentrate on the period from 1989 through to 2013, and its heading is: **The Stagnation of the Preferential Option for the Poor.** It will be my contention that the incorporation of the preferential option for the poor into CST should have led to an increased dissemination of the teaching throughout the universal Church. This did not eventuate and as a result by 2013 the teaching had stagnated. The CST promulgated during the papacies of John Paul II and Benedict XVI will be examined in relation to why they were ineffective in relation to the advocacy and expansion of the teaching.

The second part of this chapter will explore the continuing publications of liberation theologians. While the writings of Gustavo Gutiérrez will remain part of the conversation,

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the voice of Jon Sobrino will enter the dialogue. Sobrino is a liberation theologian who offered a liberationist approach to Christology. His Christological insights provided new ways to understand and apply the preferential option for the poor, but they were ostensibly ignored by the Church hierarchy.

Chapter Four will deviate from the chronological order presented in the previous chapters and focus on American social activist and spiritual writer Dorothy Day. The title for this chapter is: Dorothy Day (1897-1980): A Prophet of the Preferential Option for the Poor. Dorothy Day is presented as an example of someone who was not a liberation theologian but authentically practised the preferential option for the poor. A great deal of her mission and ministry pre-dates the formulation of the teaching and the emergence of liberation theology. While I will argue that Dorothy Day was an advocate of CST and an effective practitioner of the preferential option for the poor, I will maintain that up until 2013, it was only liberation theology that had provided an effective theological framework for the teaching’s dissemination.

Chapter Five will be titled Pope Francis and the Church of the Poor and cover the period from 2013 to the current day. The election of Pope Francis in April 2013 has seen the preferential option for the poor receive a highly visible renewed thrust in both the Church and wider society. While Pope Francis may be sympathetic to aspects of liberation theology he is not a liberation theologian. Hence any alternative criteria the Pope is using to enhance the teaching will be scrutinised.

My examination of Pope Francis’ ecclesial renewal leads me to conclude that he is attempting to reinvigorate the Church’s response to Pope John XXIII’s original call for a Church of the poor. Pope Francis is presenting the Church with an ecclesial model that
would see it jettison some of its historical privileges and seek a path that is in closer proximity to the Gospel. It is a Church that is vulnerable and humble, rather than triumphant; a Church that is in need of God’s grace, rather than self-assured; and a Church that is willing to listen to all the people of God. It is my firm belief that the teaching on the preferential option for the poor is more likely to flourish in an ecclesiology that emphasises a Church of the poor. In such a Church the potential ambiguity in the words “preferential option” is dismissed as the teaching is evident in the centre of the Church’s identity and mission.

Chapter Six is titled: Separating the Teaching on the Preferential Option for the Poor from its Liberation Theology Roots and a Way Forward for the Church: Internal and External Challenges. A primary concern of this thesis is to argue that one does not need to be a liberation theologian to practise a preferential option for the poor. Dorothy Day and Pope Francis will be presented as examples of this claim. Both have avoided the more controversial methods adopted by the early liberation theologians (i.e. Marxist analysis and socialist economic agendas), and based their approach to the teaching on scriptural, experiential, and in the case of Pope Francis other theological sources. What is significant is that both Dorothy Day and now Pope Francis have been subjected to the same accusations (Communism and the politicisation of the Gospel) as many liberation theologians were and possible reasons for these accusations will be explored. What the accusations do reveal is that there remains strong opposition to how the teaching is interpreted and implemented both inside and outside the Church.

This chapter will include a summary of the internal and external challenges that the teaching faces in this current historical period.
My Conclusion is: That despite liberation theology’s central role in the formulation and development of the teaching on the preferential option for the poor, one does not need to be a liberation theologian to practise the teaching. The major requirement of the teaching is fidelity to the Gospel and to the teaching of the Church. For all the controversy that is associated with the teaching it is a call to authentic discipleship; this is a teaching that calls the entire Church to account. The Church’s historical experience is replete with women, men and organisations that have in various ways, displayed great commitment to the poor. However, the Church as an ecclesial institution has struggled to authentically present itself as a Church of the poor and this failure has severely curtailed its capacity to be a more effective witness of the teaching on the preferential option for the poor.

This thesis begins in 1891 and traces the slow but methodical journey of the teaching’s formulation. While exact dates are difficult to determine I would surmise that an articulated theological framework for the preferential option for the poor is more than fifty years old and its official position in Church teaching is at least 35 years old. Based upon these approximate timelines it is reasonable to ask what impact the teaching has made on the wider Catholic Church. How many Catholics have knowledge of this Church teaching? How many Catholic communities throughout the world incorporate the teaching into their worship and mission? These questions are self-interrogative; they are meant to lead the Church to reflect on whether the teaching has been enhanced since it was embedded into CST. My conclusion is that the teaching was not enhanced by its incorporation into official Church teaching and is in serious need of resuscitation. Pope Francis may be breathing new life into the teaching but how effective will his methodology be?
History has already taught us that occasional references to the teaching in Papal documents is insufficient; the teaching needs to be understood in terms of discipleship and it needs to be part of the formation of all the baptised. Co-founder of the Catholic Worker Movement and advocate of CST, Peter Maurin said:

If the Catholic Church is not today the dominant social force, it is because Catholic scholars have failed to blow up the dynamite of the Church, have wrapped it up in nice phraseology, placed it into a hermetic container and sat on the lid. It is about time to blow the lid off so that the Catholic Church may again become the dominant social force.¹¹

Maurin’s language belies his pacifism but he is referring to the capacity of CST to influence the wider society. He wrote this well before the formulation of the preferential option for the poor but its sentiment rings true today. In a world that is increasingly individualistic and directed by neo-liberal economic philosophy, the practise of the preferential option for the poor would be a concrete reminder to the faithful and to the world of the dangerous memory and radical mission of Jesus Christ. This teaching cannot be “wrapped up in nice phraseology” it contains the potential for, an as yet unrealised historical shift in the Catholic Church and as a consequence, an influential social force in the world. The teaching is in desperate need of disciples, be they liberation theologians or not.

Chapter One

The Formulation of the Preferential Option for the Poor (1891-1980).

The purpose of this chapter is to examine chronologically the major contributors to the formulation of the teaching on the preferential option for the poor. Key themes will be extracted from Catholic Social Teaching (CST), the CELAM Conferences of Medellín\(^1\) (1968) and Puebla\(^2\) (1979), and the liberation theology of Gustavo Gutiérrez. The extractions from each of these entities are for the purpose of highlighting their specific roles in the formulation and development of the teaching.

There will be four parts to this chapter. Part I will deal with the landmark social encyclicals that were issued by various Popes between 1891 and 1968. These publications laid the philosophical and theological foundations for Catholic approaches to issues of social justice. These issues include people’s relationship to the body politic, the meaning and purpose of political authority, and the importance of social justice in economic matters. The early encyclicals bore witness to a Church that was beginning the process of incorporating social justice into the realm of moral theology. This direction was, in part, prompted by the expansion of Marxist-socialist ideology which had promoted itself as an advocate of the poor. Marxist-socialism and unbridled capitalism were ideologies that CST would consistently oppose.

\(^1\) CELAM, Second General Conference of Latin American Bishops at Medellin “The Church in the Present Day Transformation of Latin America in the Light of the Council” (Washington D.C. USCC 1973), (Hereafter to be cited as Medellin).

\(^2\) CELAM, Third General Conference of Latin American Bishops at Puebla. Evangelization at Present and in the Future of Latin America. (Slough, St Paul Publications, 1980), (Hereafter to be cited as Puebla).
In the watershed 1965 Vatican II document *Gaudium et Spes* there was a call for both an internal Church renewal and a regeneration of the Church’s divine mission. The Fathers of the Council called upon the “People of God,” to engage with the world and to read the “signs of the times.” This clarion call provided the inspiration for Church communities to look upon their own historical context through the lens of faith and then engage in concrete action to respond to their particular situation. This particular methodology would have a significant influence on the deliberations of the Medellín Conference and the liberation theology of Gustavo Gutierrez.

Part II of the chapter will focus on the Medellín Conference and Gustavo Gutiérrez’s *A Theology of Liberation*. The Medellín Conference and Gustavo Gutiérrez are integral to the formulation and development of the preferential option for the poor. Starting from the perspective of the poor in Latin America, they looked at the “signs of the times,” and articulated a pastoral, ecclesial and theological response.

Part III of the chapter will concentrate on CST published subsequent to the Medellín Conference and the publication of *A Theology of Liberation*. These documents offer insights into the Vatican’s response to the pastoral, ecclesial and theological ideals presented by Medellín and Gutiérrez. How would the universal Church react to such a bold, innovative and localised approach to poverty? Part III will also include a summary of the CELAM Conference at Puebla (1979). While this conference would ratify much of Medellín’s conclusions, there were tensions that saw divisions arising within the Latin American

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3 *Vatican II, Gaudium et Spes (Pastoral Constitution on the Church in the Modern World)* (Boston: Pauline Books and Media, 1965). (Hereafter this document will be referenced as GS)
4 In the Vatican II document *Lumen Gentium* (Dogmatic Constitution on the Church) the second chapter defines the Church as the People of God. Theologist Jose Comblin stated: “Many believed that the concept of “people of God” was Vatican II’s main theological contribution, affecting all the council documents; it is certainly the best expression of the “spirit” of Vatican II.” *People of God* (Maryknoll, NY: Orbis Books, 2004), vii.
5 GS, # 4.
Church. These tensions would ultimately impact on the way the preferential option for the poor was disseminated in Latin America and beyond.

Part IV of the chapter will offer a brief expose of the life of Saint Oscar Romero. Romero’s courageous defence of the poor in El Salvador would come to epitomise the dangers inherent for those who challenged the political and economic elites in Latin America. His fidelity to the poor would not only lead to his martyrdom but also reveal deep divisions within the local and universal Catholic Church in matters pertaining to the Church’s understanding and application of the preferential option for the poor.

**Part 1: Catholic Social Teaching (1891-1968)**

**Rerum Novarum (Rights and Duties of Capital and Labour) (1891)**

In 1891 Pope Leo XIII published the Catholic Church’s first major official Church statement on social justice in the form of the social encyclical *Rerum Novarum* (RN). Its primary purpose was to respond to the poverty, injustice, and exploitation of workers in the wake of the industrial revolution. RN sets a precedent insomuch as all subsequent documents attempt to respond to the pressing social issues of their respective eras.

In the document Pope Leo XIII established a foundational theme within CST tradition with his sharp critiques and rejection of both Marxist-socialism and unbridled capitalism. Marxist-socialism was of particular concern as its atheistic and revolutionary ideology was considered by the Pope as a threat to society and the Church.

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Pope Leo XIII was writing at a time when the industrial revolution was shaping the European political, social and economic landscape. To stave off the threats of both Marxist and capitalist ideology, Pope Leo XIII proposed a society that included just wages, trade unions, better working conditions and a renewal of religious practise. The Pope was interested in the Church’s contribution to social harmony rather than any analysis of the causes of poverty, but he did raise concerns regarding the cruel working conditions to which many workers were subjected: “It is neither justice nor humanity so to grind men down with excessive labour as to stupefy their minds and wear out their bodies.” The injustice of the working conditions of the poor led Pope Leo XIII to suggest that the government should play a role in the implementation of better working conditions. “One important legacy of RN is its validation of the legitimate though limited, role of the state in resolving social issues. Poverty has a systemic cause and is not simply a moral failure. The Church and its charitable organisations alone were not enough to respond to the problem.”

Pope Leo XIII condemned the “hardheartedness of employers and the greed of unchecked competition” but it was predominantly Marxist-socialism that the document attacked: “Socialists, working on the poor man’s envy of the rich, are striving to do away with private property, and contend that individual possessions should become the common property of all, to be administered by the State or by municipal bodies.” The Pope believed socialism hampered people’s efforts to better their lives.

Socialists, therefore, by endeavouring to transfer the possessions of individuals to the community at large, strike at the interests of every wage

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7 RN, # 33.
8 RN, # 3.
10 RN, # 3.
11 RN, # 4.
earner, since they would deprive him of the liberty of disposing of his wages, and thereby of all hope and possibility of increasing his resources and of bettering his condition of life.\textsuperscript{12}

Pope Leo XIII was seeking a more just and compassionate response to poverty. He was calling for personal transformation (privatised justice) rather than offering any particular theological interpretation of poverty or investigation into economic structures that might contribute to the maintenance of poverty. It was personal virtue rather than economic change that was the key for renewal.

Despite the Pope’s concern for the temporal needs of the poor, the document contained hints of religious fatalism. It declared that Christ’s sufferings sweetens our own and that the inequality in society does not interfere with the ultimate goal of Christianity which lies in a future not of this world. Pope Leo XIII states: “God has not created us for the perishable and transitory things of earth, but for things heavenly and everlasting; He has given us this world as a place of exile, and not as our abiding place.”\textsuperscript{13}

The encyclical offered a definitive statement from the Church in relation to the protection of the poor and the condemnation of those who seek to exploit them. It contained a multiplicity of ethical responses in relation to poverty and set a precedent that would see the Church, via its social encyclicals, defend the rights of the poor. It did not however, offer any biblical or theological contribution on how the Church understands poverty and these were insights that would ultimately become important in the formulation and development of the teaching on the preferential option for the poor.

\textsuperscript{12} RN, # 5.
\textsuperscript{13} RN, #21.
Quadragesimo Anno (After Forty Years) (1931)

Forty years after the publication of Rerum Novarum, Pope Pius XI issued the encyclical Quadragesimo Anno (QA).

The title itself indicated that the Pope wanted the encyclical to build upon the themes of its predecessor. This encyclical was written during the Great Depression (1929-1939), and while there was continuity with RN in relation to workers’ rights, the right to private property, and the condemnation of Marxist-socialist ideology, it contained a stronger attack on liberal capitalism.

Pope Pius XI was worried that liberal capitalism was leading people toward an unhealthy individualism. Christine Firer Hinze explains: “Pius sees a direct relationship between modern individualism and the most destructive features of capitalist economics. Pius condemns the vast and unjust disparities of economic power, systematic inducements to greed, and the concentration of wealth in the hands of a few.”

Pope Pius XI’s expression of disquiet regarding the individualism inherent in liberal capitalism would become a regular concern in Catholic social doctrine.

Pope Pius XI diagnosed that different classes operated within a society but that a burgeoning inequality was a threat to social harmony:

Each class, then, must receive its due share, and the distribution of created goods must be brought into conformity with the demands of the common good and social justice. For every sincere observer realises that the vast

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14 Pope Pius XI, Quadragesimo Anno, (Melbourne: Australian Catholic Truth Society, 1931). (Hereafter this document will be cited as QA).
15 QA # 25 speaks of the obligation of the state to protect worker’s rights and reiterates RN # 29.
16 QA # 44-46 follows RN # 4 by opposing a socialist theory that threatened private ownership of property. The document defined private property in terms of the common good and not as an absolute individual right.
17 QA, # 10.
18 Pope Pius argued that a focus on the accumulation of wealth could lead to economic domination (# 105) and that economic individualism led to economic imperialism (# 109).
19 Christine Firer Hinze, “Commentary on Quadragesimo Anno (After Forty Years),” in Modern Catholic Social Teaching, 168.
difference between the few who hold excessive wealth and the many that live in destitution constitutes a grave evil in modern society.\textsuperscript{20}

Pope Pius XI argued that individualism and inequality destabilised social harmony and led to separation in society. This individualism was a threat to a key principle in CST called the common good.\textsuperscript{21} The common good, on the other hand, contributed to social harmony and sought to create co-operation between peoples. Pope Pius XI was responsible for inserting the term “social justice” into the Catholic vocabulary.\textsuperscript{22} He used the expression multiple times throughout the document and relates it to the themes of social harmony and the common good.

Despite his strong critique of both Marxist and capitalist ideologies, the Pope argued that a truly just society could only be realised through the pursuit of personal virtue: “For justice alone can, if faithfully observed, remove the curses of social conflict but can never bring about the union of minds and hearts... If this bond is lacking, the best of regulations comes to naught, as we have learnt from too frequent experience.”\textsuperscript{23}

QA attacked Catholic employers who ignored papal directives stating that: “These people are the reason the church, without in any way meriting it, can be seen, and can be accused of, taking sides with the wealthy and to lack sympathy for the needs and the sufferings of those who are deprived of their share of well-being in this life.”\textsuperscript{24} The question of the Church’s “unmerited” alliance with the wealthy would become an important theme in the

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\textsuperscript{20} QA, # 58.
\textsuperscript{21} The Common Good: “Every person should have sufficient access to the goods and resources of society so that they can completely and easily live fulfilling lives. The rights of the individual to personal possessions and community resources must be balanced with the needs of the disadvantaged and the dispossessed. The common good is reached when we work together to improve the well-being of people in our society and the wider world”. (https://www.caritas.org.au/about/catholic-social-teaching-values).
\textsuperscript{22} See QA, # 58, 74 and 88.
\textsuperscript{23} QA, # 137.
\textsuperscript{24} QA, # 125
post Vatican II era, especially in Latin America. Ultimately, the formulation and development of the preferential option for the poor would include a definitive demand that would challenge the Church in Latin America to divorce itself from its historical alliance with the continents political and economic elites.

QA continues RNs concern for the poor and condemns their exploitation but there remained a lack of theological and scriptural investigation in relation to the wider issue of poverty.

**Catholic Social Teaching and Natural Law Theory**

I have thus far examined only two social encyclicals. However, I feel it would be proper to mention briefly the philosophical foundations which underpin official Catholic approaches to social justice questions. I insert this summary at this juncture because the ensuing documents published by Pope John XXIII will display an approach to the natural law that is different to that of his predecessors. This difference would have a significant impact on the way subsequent documents were written and understood. The direction of CST during the short papacy of John XXIII opened up the possibility of new theological insights into the Catholic Church’s social justice mission and would have a significant influence on the Medellín Conference and the birth of Latin American liberation theology.

The *Compendium of the Social Doctrine of the Church* states: “The principles of the Church’s social doctrine are based on the natural law. We can see the importance of moral values, founded on the natural law written on every human conscience; every human conscience is
hence obliged to recognise and respect this law.”

The reasons the Catholic Church adopted natural law theory as its normative ethic is explained by Stephen Pope:

The Church turned to natural law for two principal reasons. The first is that Sacred Scripture provides neither a moral philosophy nor an extensive body of law with which to govern political communities. Secondly, natural law provided a conceptual vehicle for preserving, explaining, and reflecting on the moral requirements embedded in human nature and expressing these claims to a wider audience.

The primary philosophic influence on Catholic natural law theory was St Thomas Aquinas (1225-1274). Aquinas posited a teleological model of morality which states that a moral life is one whereby a person’s reason directs them toward their proper end or goal. Moral behaviour is in fact acting in accordance with one’s nature. Aquinas states that our “absolute end” is communion with God and lies beyond this world, but living according to our nature assists in our ultimate transcendence. Charles Curran questions the effectiveness of this theory: “Natural law, fails to highlight the central role of Jesus Christ in Christian morality. The Gospel, Jesus Christ, and grace should play a significant role in the moral life of Christians. The natural law theory in general and the early papal social encyclicals in particular downplay this role.”

From the Eighteenth to the Twentieth century the dominant interpretation of the natural law contributed to a spiritual/temporal dichotomy. There was a belief that moral laws could be deduced from “eternal truths” pertaining to all people. Modern scholars question this

26 Stephen Pope, “Natural Law in Catholic Social Teachings”, in Modern Catholic Social Teaching, 42.
27 Aquinas says: “For man and other rational creatures attain to their last end by knowing and loving God.” Eighth Article [1-11, Q. 1, Art. 8]. Summa Theologica. Translated by the Fathers of the English Dominican Province. (New York: Benziger Brothers, 1947).
inflexibility claiming it conflicts with Aquinas’ original intent and adversely affected early social encyclicals:

Aquinas had recognised that an adequate approach to natural law should recognise that only the most general principles of morality are the same for all persons, that more detailed moral demands can vary from culture to culture, and that specific moral rules can sometimes change through history. Thomas’ flexibility in this regard, however, had not always been characteristic of the earlier encyclicals of the modern social teaching of the Church.\textsuperscript{29}

In the social encyclicals of Pope John XXIII we see a shift in the practice of deducing moral laws from eternal truths to an inductive method that placed more emphasis on historical reality and human experience.

It was in the 1960’s that a fundamental change occurred which was to mark a turning point in Catholic Social Teaching. Its attitude to the world became more positive and optimistic. It shifted its emphasis away from dependence on the philosophy of natural law – the notion that norms of behaviour could be logically deduced from a study of the essential nature of things – towards listening to human experience and developing a social analysis from that.\textsuperscript{30}

While Pope John XXIII would enliven CST by allowing greater emphasis on historical context and existential experience, he also promoted a scriptural renewal and this renewal would also play a significant role in the Church’s historical progression toward the formulation on the teaching of the preferential option for the poor. The teaching would ultimately be understood and accepted as a biblical imperative, an option taken by Jesus and therefore one that should be taken by His disciples. The social encyclicals issued by Pope John XXIII did not oppose the natural law, but it opened up the possibility of the Gospel and Jesus Christ playing a more significant role in influencing CST and ultimately moral theology.

\textsuperscript{29} David Hollenbach, “Commentary on Gaudium et spes, (Pastoral Constitution on the Church in the Modern World),” in Modern Catholic Social Teaching, 286.
Mater et Magistra (Mother and Teacher) (1961)

Thirty years passed before Pope John XXIII issued the Church’s third major social justice encyclical titled *Mater et Magistra* (MM).³¹ This encyclical marked the advent of a prolificacy of social justice encyclicals and magisterial statements that has continued to this day. John XXIII would be Pope for less than five years and issued only two social encyclicals, but it was he who initiated a major renewal in the Catholic Church when he called for the Second Vatican Council. It was during his papacy that the Church began to explore more fully its social justice mission.

Unlike his predecessors Pope John XXIII did not engage in condemning the major political ideologies of Marxist-socialism and unbridled capitalism. Despite the fact that his papacy took place during the Cold War era, he wanted to focus on what a more unified humanity was capable of achieving. “Pope John had a vision of a renewed Catholic Church to serve as an agent of Christian unity and to help society address the issues of economic injustice, the threat of nuclear war, and conflict between nations.”³²

There were three key elements in MM that marked a significant change in the direction of CST. The first was its universality.³³ The second was the employment of the Cardijn “see-judge-act” method.³⁴ Third was its desire to engage with secular society.³⁵

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³¹ Pope John XXIII, *Mater et Magistra*, (Melbourne: Australian Catholic Truth Society, 1961), (Hereafter this document will be cited as MM). MM was also known as Christianity and Social progress.
³³ Writing in relation to the international economic imbalance Pope John XXIII calls for a greater sense of universal solidarity. “The solidarity which binds all men and makes them members of the same family requires political communities enjoying an abundance of material goods not to remain indifferent to those political communities whose citizens suffer from poverty, misery, and hunger and who lack even the elementary rights of the human person.” MM, 31.
³⁴ MM, 54.
³⁵ “On becoming Christian people cannot but feel obliged to improve the institutions and the environment in the temporal order.” (MM, 34).
In relation to universality, Pope John XXIII believed there was great potential in economic development and promoted solidarity between peoples that would encourage a more equitable distribution of the earth’s goods and resources. He called upon developing nations to assist the economic growth of underdeveloped nations, but qualified their involvement by appealing to the principle of subsidiarity: “The economically developed political communities, when lending their help, must recognize and respect this individuality and overcome the temptation to impose themselves by means of these works upon the community in the course of economic development.” John XXIII wanted the developed nations to contribute to the developing world in a way that was primarily advantageous to the poorer nations rather than themselves.

The second element of change was the use of the “see-judge-act” method. This method was developed by Belgian priest and later Cardinal Joseph Cardijn in the 1920s and encouraged movements such as the Young Christian Workers/Students to relate their faith to the ordinary experience of daily life. Their method was to observe the world around them and determine what was discordant with their faith, make an informed judgement on what to do and then act upon that judgement. The method was imbued with a reflective process which attempted to discern appropriate action in relation to the Gospels. Pope John XXIII promoted this method as he believed it contained the capacity for universal applicability to local situations. Marvin Mich explains: “John XXIII proclaimed a new pedagogical principle for the church, the Christian is not only educated for action but by action. There is a fusion of education and action.” This educative process laid the foundation for the laity to be more than receptacles of Church teaching and was a theme that Pope John XXIII was keen to

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36 MM, 33.

37 Marvin Mich, “Commentary on Mater et magistra (Christianity and Social Progress),” in Modern Catholic Social Teaching, 203.
promote, especially among the youth. “It is particularly important that youth be made to
dwell often on these stages (see-judge-act), and as far as possible reduce them to action.
The knowledge acquired in this way is not merely abstract ideas but is something to be
translated into deeds.”\textsuperscript{38}

The see-judge-act methodology was a precursor to what Gustavo Gutiérrez would call
“theology as critical reflection on praxis.”\textsuperscript{39} This theological method will be explored in \textit{Part II} of this chapter but engagement with, and concrete action on behalf of the poor, would
become vital components in the formulation of the preferential option for the poor.

The third initiative was to reach out to secular society. Pope John XXIII acknowledged that
society itself was changing and that the Church needed to be engaged, rather than
separated from this evolution. He was keen for the Church to collaborate with wider society
in the pursuit of common goals.

\textbf{Pacem in Terris (Peace on Earth) (1963)}

Pope John XXIII issued the encyclical \textit{Pacem in Terris} (PT)\textsuperscript{40} in 1963. The historical context
that accompanied PT was dominated by the Cuban Missile Crisis (October 16-28, 1962) and
the menace of nuclear war. John XXIII acted as an intermediary in this Cold War crisis and
despite the international tension, continued to express optimism in humanity’s capacity to
pursue peace.

\begin{flushright}
\textsuperscript{38} MM, 44. \\
\textsuperscript{39} Gustavo Gutiérrez, \textit{A Theology of Liberation}, 5. \\
\textsuperscript{40} Pope John XXIII, \textit{Pacem et Terris} (Melbourne: Australian Catholic Truth Society, 1963). (Hereafter this
document will be cited as PT)
\end{flushright}
In PT Pope John XXIII incorporates human rights into CST. There are hints of the philosophy of cosmopolitanism in this document. Cosmopolitanism is a philosophy that advocates for solidarity between peoples, a solidarity that leads them beyond tribe or nation and seeks to build a broader sense of belonging for all people. While all the social encyclicals had advocated on behalf of the poor PT started to emphasise that the unjust treatment of the poor was an abuse of their fundamental human rights.

PTs references to human rights are many and varied. The topic had been absent from previous social encyclicals as Popes Leo XIII and Pius XI were suspicious of its historical liberal inclination. Pope John XXIII took a different approach by harmonising human rights with the common good and spoke of the interdependence rather than independence of people. He argued that as all are made in the image of God, each person, by virtue of their very nature, had inviolable rights.

Pope John XXIII valued “relationships of equality” because he viewed inequality as a threat to the common good. It was the poor, he believed, who were the major victims of inequality and the state had a duty to protect their rights: “Considerations of justice and equity, however, can at times demand that those involved in civil government give more attention

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41 In his commentary on PT Drew Christiansen writes “Because the encyclical puts the rights of persons as members of the one human family ahead of state interests, Catholic political theory stemming from Pope John XXIII may be described as “cosmopolitan”. “Commentary on Pacem in terris, (Peace on Earth),” in Modern Catholic Social Teaching, 225.
42 In the first chapter of PT titled “Order between Men” there are references to the right to live (#11); rights pertaining to moral and cultural values (#12); rights to worship (#14); to choose freely one’s state in life (#15-17); economic rights (#18-22); rights of meeting and association (#23-24); rights to migration (#25); political rights (#26-27).
43 Pope Leo XIII and Pope Pius XI were weary of the call for greater human rights believing them to be a derivative of the Enlightenment and therefore containing the capacity to lead people away from God. They adjudged that in this ideology each person could be a law unto themselves and therefore have no need of God.
to the less fortunate members of the community, since they are less able to defend their
rights and to assert their legitimate claims.”

Pope John XXIII believed that in order for peace to exist, political systems needed to create
and uphold human rights and that this needed to be recognised at an international level:
“Political communities may have reached different levels of culture, civilization or economic
development but that is not sufficient reason for some to take unjust advantage of their
superiority over others.”

PT began to articulate a criterion by which international, as well as local poverty could be
defined in terms of an abuse of human rights. This is a theme that would be adopted and
extrapolated at the Medellín Conference. A preferential option for the poor by definition
respects the rights of the poor and seeks to overcome any abuse the poor may experience at
both a local and international level.

The Second Vatican Council and Gaudium et Spes (Joy and Hope) (1965)
The Second Vatican Council orchestrated a significant reform within the Catholic Church.
Although a major focus was to look externally and to “read the signs of the times,” this was
a reform that also looked into the heart of its own ecclesial structures. The hierarchy of the
Church gathered to discuss ways that the Church could continue its mission of preaching the
good news of Jesus Christ in a rapidly changing world. One of the significant theological
contributors to the Council, Yves Congar, wrote:

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44 PT, # 68.
45 PT, # 105.
The council transcended a purely “hierarchy-centred” ecclesiology and it denounced legalism (without of course, proposing ignorance of law!). It gave primacy to an ontology of grace rooted in the sacraments, and primacy as well to baptism with respect to roles in the Church as a society of persons. The council adopted an apostolic, rather than a primarily ritual understanding of the priesthood, giving full voice to the place of the Word and to catechesis, and it recognized charisms and the variety of ministries in the church, etc.46

GS was popularly known as the Pastoral Constitution on the Church in the Modern World and was the result of much openness, dialogue and conflict among bishops and theologians who participated in its articulation. The document in its final form was issued by Pope Paul VI but it contained the “spirit,” of Pope John XXIII who had initiated the renewal of the Church. Published in 1965 the document proposed a Church imbued with the Word of God but engaged with its historical surroundings. Pope John XXIII had already elevated the status of human rights and expressed a willingness to engage with the secular world in MM and PT; GS represented a fuller commitment to these ideals combined with a specific emphasis on biblical renewal.

The new emphasis on the scriptures led to a significant departure from the usual Neo-Scholastic philosophical framework of Catholic social teaching. The moral significance of scripture was found not in its legal directives as “divine law” but in its depiction of the call of every Christian to be united with Christ and actively participate in the social mission of the Church.47

Scripture is historically conditioned and its moral content requires readers to utilise their “analogical imagination,” in determining how it can be historically applied.48 This was a task

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47 Stephen J. Pope, “Natural Law in Catholic Social Teachings,” in Modern Catholic Social Teaching, 54.
48 Scholars argue that the early Church’s moral teaching was impacted by their belief in an imminent end-time. This biblical theme of eschatological immediacy requires modern readers to use their analogical imagination in regard to interpretation and application. William C. Spohn explains: “The Analogical Imagination bridges the moral reflection of Christians and the words and deeds of Jesus. It provides the cognitive content for obeying the command ‘Go and do likewise.’ That command of Jesus directs Christians to use their imaginations creatively to discover new ways of acting that are faithful to the story of the Good Samaritan and the complete story of Jesus.” Go and Do Likewise: Jesus and Ethics, (New York: Continuum 2007), 50.
for all members of the Church with GS highlighting the importance of the laity to “hear, distinguish and interpret the many voices of our age, and to judge them in the light of the divine word.”

The Church’s scriptural renewal and its relationship to history was no longer the sole domain of scholars.

An important component of this biblical renewal was the acknowledgement in GS of the biblical preference of God’s love for the poor and this challenged the Church to concretely respond to this preference.

The council, considering the immensity of the hardships which still afflict the greater part of mankind today, regards it as most opportune that an organism of the universal Church be set up in order that both the justice and love of Christ toward the poor might be developed everywhere. The role of such an organism would be to stimulate the Catholic community to promote progress in needy regions and international social justice.

GS states that although a just society cannot be equated to salvation, the pursuit of such a society assists in preparing salvation’s way. “While earthly progress must be carefully distinguished from the growth of Christ’s kingdom, to the extent that the former can contribute to the better ordering of human society, it is of vital concern to the Kingdom of God.”

GS provided fertile ground in which the preferential option for the poor could germinate. First, its biblical renewal led to a scriptural understanding of God’s preferential love for the poor. Second, the mandate to engage with historical reality contributed to the development of praxis theology. Both these methods would be adopted and expanded by the Bishops at the Medellín Conference and Gustavo Gutiérrez.

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49 GS, # 44.
50 GS, # 90.
51 GS, # 39.
Before proceeding to the post-Vatican II documents and in order to maintain chronological accuracy I would like to make reference to a document that is known as The *Pact of the Catacombs*. This somewhat illusive and widely unknown document has begun to re-emerge during the papacy of Francis and is aligned with the current Pope’s image of a Church of the poor.

A more recent article on the document by Msgr Prof. Hector Scerri states: “The 16th day of November marks an important anniversary, unfortunately unsung and un-commemorated for nearly half a century. Fifty-four years ago, on Tuesday 16 November 1965, the *Pact of the Catacombs* was signed by twoscore bishops, determined to embrace a radical commitment which would send ripples to the ends of the Catholic Church.”

In short, the document commits the signatories to a simpler lifestyle in keeping with Pope John XXIII’s call for a church of and for the poor. These Bishops renounced the earthly trappings of their office and pledged to adopt a lifestyle that was in accord with the ordinary people to whom they were shepherds. The signatories to this document promised an ecclesial renewal that was clearly evident in the Medellin Documents and Gutiérrez’ *A Theology of Liberation*. There were additional signatories to those present at the initial meeting and it was Cardinal Lercaro of Bologna who presented the document to Pope Paul VI. Cardinal Lercaro’s commitment to a poorer Church and his vision of Vatican II moving in that direction was referenced in the *Introduction*.\(^{53}\)

There is no reference to this document in Gutiérrez’s *A Theology of Liberation* or subsequent social encyclicals/documents; therefore, while I acknowledge its historical

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\(^{53}\) See page 1, footnote 1.
significance, it is difficult to determine whether it had any specific influence on the major contributors to the teaching of the preferential option for the poor.

**Populorum Progressio (On the Development of Peoples) (1967)**

The final encyclical to be published before the Medellín Conference (1968) was *Populorum Progressio* (PP). Pope Paul VI issued the document in 1967 and in it he promoted development as a visible way to overcome poverty and inequality. Pope Paul VI viewed development as a Christian mission arguing that it would not only improve the lot of the poor, but would also contribute to peace and justice in the world.

Pope Paul VI spoke of “Man’s Complete Development” and this integral development included the capacity for people to participate in the cultural, social and political aspects of society. The poor, he said, are often denied participation in their respective societies and thus he redefined poverty by expanding its meaning beyond material scarcity, to include cultural, social and political inclusion.

Pope Paul VI argued that if wealthy nations advance their economies at the expense of poorer nations it destroys solidarity between peoples. He bemoaned the superfluous wealth of some nations and warned that failure to assist the poorer nations equates to the sin of avarice. “Continuing avarice on their part will arouse the judgement of God and the wrath of the poor, with consequences no-one can foresee.”

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54 Pope Paul VI, *Populorum Progressio*, (London: Catholic Truth Society, 2007). (Hereafter this document will be cited as PP)
55 PP, # 50.
56 PP, # 6.
57 PP # 1 speaks of the poor seeking “a larger share in the benefits of civilisation.”
58 PP, # 49.
alleviating poverty in the form of a world fund drawn from a percentage of various nations’ military expenditure.\textsuperscript{59} He described the fight against poverty as “furthering man’s spiritual and moral development.”\textsuperscript{60}

Pope Paul VI also attempted to raise the Church’s awareness of its universality and therefore its mission to stand with the poor:

\begin{quote}
Catholicism is precisely in transition from an institution rooted in Europe and North America to one massively engaged in the least developed nations in the world. That means that the emphasis on solidarity is not only a theoretical matter grounded in social ethics but a practical matter vital to the concerns of the Church’s primary constituencies.\textsuperscript{61}
\end{quote}

PP reiterated the biblical foundation of Christ’s preaching to the poor as integral to His mission.\textsuperscript{62} It also spoke of the sinful economic structures that benefit wealthy nations referring to this situation as a “particular type of tyranny.”\textsuperscript{63} Opposing sinful structures would become an important theme for the Bishops at Medellín, the liberation theology of Gustavo Gutiérrez and an important practise of those who take seriously the biblical mandate of an option for the poor.

\textbf{Summary of the Key Points in Part 1 of this Chapter}

Each of the social encyclicals was a major statement made in response to the economic hardships and concomitant poverty of their respective historical eras. While they have displayed continuity, there is clear evidence of an evolution, an evolution that would

\begin{itemize}
\item \textsuperscript{59} PP, # 51.
\item \textsuperscript{60} PP, # 76.
\item \textsuperscript{61} Allan Figueroa Deck, “Commentary on Populorum progressio (On the Development of Peoples),” in Modern Catholic Social Teaching, 310.
\item \textsuperscript{62} PP, # 12.
\item \textsuperscript{63} PP, # 26.
\end{itemize}
contribute to the formulation and development of the teaching on the preferential option for the poor. The following points are a summary of that evolution:

- The historical progression of CST has seen it elevate the importance of human experience and existential reality. This was encouraged by the Vatican II declaration to “read the signs of the time.”
- The earlier encyclicals used a deductive methodology that saw them reliant upon eternal truths in order to rationally determine principles of moral behaviour. Pope John XXIII and Pope Paul VI favoured an inductive method which allowed for historical reality and human experience to influence moral principles.
- Justice was initially considered a private concern but as the encyclicals evolved the concept of social justice became more prevalent. There was a growing awareness that the pursuit of justice and peace was commensurate with the mission of the Church.
- Biblical scholarship came to play a more important role in determining moral behaviour.
- When describing the global political and economic order, Pope Paul VI used terms such as “situations of sin” and “structural injustice.” In doing so he acknowledged that structures themselves could be sinful as they could negatively influence the societal order.

While I acknowledge the centrality of CST to the Church’s universal social justice agenda, and its consistency in striving to protect the poor, it would be the Medellín Conference and liberation theology that would develop and offer specificity to the idealism contained within CST. It is they who would discern a new way of being Church that would have provincial and
universal ramifications for the whole Church. The Medellín Conference and Gutiérrez’s *A Theology of Liberation* offered a new approach to living faith, a new model of Church, a new theological language (liberation) and a new option – an option that would become known as the option for the poor.

**Part II: The Influence of the CELAM Conference at Medellín (1968) and Gustavo Gutiérrez’s *A Theology of Liberation* on the Formulation of the Preferential Option for the Poor**

The Medellín Conference, at which Gustavo Gutiérrez was a theological advisor, was an important moment in the theological advancement and formulation of the Catholic Church’s teaching of the preferential option for the poor. While its immediate concern was the Church’s social mission in Latin America, this Conference signified an important milestone for the wider Church as she began to develop contextual, theological and pastoral responses to mass poverty. CST had consistently defended the poor but its development of a theology of the poor was limited.

The title for the Second General Conference of Latin American Bishops (CELAM) held in Medellín, Colombia in 1968 was *The Church in the Present Day Transformation of Latin America in the Light of the Council*. While the topics discussed at the meeting were pertinent to the religious, economic, political and cultural realities of Latin America, the title indicated that the Conference desired to be connected to, and influenced by, the universal Church renewal stemming from the Second Vatican Council. Gustavo Gutiérrez emphasised Medellin’s theological relevance to the universal Church. “Medellín provided the universal Church with a demanding proposal: the identity of the Church today leads us into solidarity
with the poor and insignificant people; in these we find the Lord who shows us the way to the Father.”

The Medellín Conference attempted to articulate how the Church could preach the good news of Jesus Christ in a continent where a vast majority of the people suffered poverty and oppression. It would come to the conclusion that the Church needed to be in solidarity with the poor if it was to bear authentic witness to this good news.

**Historical Context in Latin America**

The Bishops at Medellín described the Latin American situation in blunt terms: “Its agonizing problems mark it with signs of injustice that wound the Christian conscience.” Alongside the economic depravity of the continent was the regions’ political uncertainty exacerbated by the 1959 Cuban communist revolution. This revolution was seen by many inside and outside the continent as proof of an orchestrated communist expansion. The Catholic Church’s historical opposition to Marxist-socialist ideology saw it aligned with other anti-Communist groups who wished to promote capitalism as a way forward, but as these entities tended to be the rich and powerful, it gave the impression that the Church was closer to them than to the poor.

The Church’s history of relative freedom and privilege within Latin America was, in part, due to its comfortable relationship with the continents political and economic elites. In its attempt to create a Church that would be in solidarity with the poor, Medellín would seek to extricate the Church from this historical position. This alliance had not only separated the

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65 Medellín, # 25.
institutional Church from the vast majority of its people, it had lessened the desire for change and promoted religious fatalism. Thomas Bokenkotter explains: “It (the Church) served the regimes well by works of charity that often alleviated at least the extremes of hunger and misery, and by the way it held before the eyes of the poor the crucified Christ as a model of resignation and submission.”

Medellín was investigating ways the Church could come closer to the poor at a time when many in Latin America and elsewhere feared the expansion of communism. The strategy of defending the rights of the poor and encouraging them to be agents of their own change in such a volatile political climate would see many Church workers being labelled as communist sympathisers.

**The Medellín Conference Documents**

The Medellín Conference took place from August 26th to September 6th 1968 and adopted a standard methodology in the formulation of its documents:

The documents produced by the Medellín conference employed a method that began with an analysis of a particular situation (justice, peace, education, youth, and so on), continued with a brief theological reflection in the light of the scriptures and Christ’s teaching, and concluded by stating a number of pastoral commitments. This method indicated a new way of understanding the Church and understanding the Church’s mission. The Church was not to be centred on itself or its own concerns, but on the mission in the very concrete world of Latin American reality; mission was conceived not only as the proclamation of the gospel but as a commitment to justice, genuine development and liberation.

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There were many topics discussed at Medellín but the ones more specifically related to the formulation and development of the preferential option for the poor were Poverty, Justice, and Peace.

**Poverty of the Church:** In the document *Poverty in the Church* there were references to both physical and spiritual poverty. The opening statement spoke of the human wretchedness that poverty can cause and declared that they, the bishops, could not remain indifferent to the magnitude of this suffering. The document encouraged Church leaders to live a life more closely associated with that of their poorer brothers and sisters:

> Within the context of the poverty and even the wretchedness in which the great majority of the Latin American people live, we, bishops, priests, and religious, have the necessities of life and a certain security while the poor lack that which is indispensable and struggle between anguish and uncertainty. And incidents are not lacking in which the poor feel that their bishops, or pastors and religious, do not really identify themselves with them, with their problems and afflictions, that they do not always support those that work with them or plead their cause.  

In keeping with Church teaching, the document acknowledged the primacy of spiritual poverty but described spiritual poverty in terms of an opening up to God rather than the more traditional approach of detachment from the world. The document argued that an encounter with the Lord should lead to a deeper sense of solidarity with the poor. When speaking of solidarity, the document was not only talking about an individual choice; it was speaking of an institutional shift.

The document states: “We, the bishops, wish to come close to the poor in sincerity and brotherhood, making ourselves accessible to them.” The quote implies that the bishops were not close to the poor and that they needed to change. Medellín pointed out with

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69 Ibid., # 9.
great clarity that the Church had to do more than plead the case of the poor. The Church, starting with its leadership needed to shift to a position that was in closer proximity to the lived reality of the poor.

The document encouraged dialogue with the political and economic elites but it also argued that solidarity with the poor included opposing those who perpetrate injustice and oppression. It was this opposition that would be the cause of much debate as it raised the possibility of protest and conflict. In a continent that had enjoyed great religious freedom, this approach would come to threaten the Church’s amicable relationship with powerful allies.

**Justice:** The *Introduction* to this thesis stated that one of its premises was to acknowledge the relationship between social justice and salvation. The Medellín document on Justice recognises this relationship: “The perfection of the human vocation is the heavenly banquet but this should vivify the concern to perfect this earth.” For Medellín, the transcendent and transformative aspects of faith were complementary and were regarded as integrated rather than separate pursuits. The relationship between spiritual poverty and physical poverty, temporal progress and the kingdom of God were, and would continue to be, key issues when discerning the theological and practical implications of a preferential option for the poor.

The document called for the Church to engage in concrete pastoral action. It adjudged that the political and economic systems prevalent throughout the continent were oppressing the

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70 Ibid., # 10.
71 See *Introduction*, page 4.
72 Medellín, *Document on Justice*, # 5.
poor and therefore denying them their human rights. A pedagogy\textsuperscript{73} that leads to informed action was a key aspect of their pastoral plan:

The lack of political consciousness in our countries makes the educational activity of the Church absolutely essential, for the purpose of bringing Christians to consider their participation in the political life of the nation as a matter of conscience and as the practice of charity in its most noble and meaningful sense for the life of the community.\textsuperscript{74}

The document was not simply challenging people to be fairer or more ethical; it recognised the need to educate people so that they could become agents of their own change.

**Peace:** Medellin’s Peace Document identified three factors that characterise the Christian concept of peace with the first being that it is primarily a work of justice:

> It (peace) presupposes and requires the establishment of a just order in which men can fulfil themselves as men, where their dignity is respected, their legitimate aspirations satisfied, their access to truth recognised, their personal freedom guaranteed: an order where a man is not an object, but an agent of his own history.\textsuperscript{75}

The second component of peace was that it was a permanent task. The Christian was to strive, even at personal cost, fearlessly to overcome injustice. The third aspect of peace is that it is the fruit of love. Peace is a fruit of the Spirit (Galatians. 5:22) and is what Christians are called to strive for. This peace is obtained via our love for God and love for our neighbour.

The document appealed for a change of heart in those who wielded power and influence:

> “We would like to direct our call in the first place to those who have a greater share of the

\textsuperscript{73} The Medellin Conference and liberation theology were influenced by Brazilian educator Paulo Freire. He published *A Pedagogy of the Oppressed* in 1969. In the book he outlines an educational method that encourages people to transform oppressive structures by educating themselves to become agents of change. Freire believed the economic, political and cultural structures in Latin America bred marginalization and dehumanized the poor. Education for the poor was a way in which those structures could be overcome.

\textsuperscript{74} Medellin, *Document of Justice*, # 16.

\textsuperscript{75} Medellin, *Document on Peace*, # 14.
wealth, culture and power.” This appeal to the wealthy and powerful was juxtaposed with the aforementioned pedagogical plan for the poor. This approach ensured that just changes for the poor were not solely dependent upon policies enacted by those who held power.

The Medellín Conference’s Innovative Agenda

The Medellín Conference was an important response to Pope John XXIII’s challenge to the Church to be a Church of the poor. Medellín embraced this challenge, and with a vast majority of the continent being Catholic and poor, the Latin American Church was in a unique position to investigate what a Church of the poor meant in theological, pastoral, ethical and ecclesial terms.

The Medellín Conference produced a response to poverty that challenged the Latin American Church and raised questions for the universal Church. Of great import was the decision by the conference members to extricate the Church in Latin America from its close association with the continents powerful political and economic entities. This decision threatened to change the political and social position of the Church in the continent: “The Medellín documents insisted that the primary pastoral issue for the Church in Latin America was the crushing poverty of the majority, and that this could only be addressed by recognizing the structural injustice that characterized the continent and undermined hopes for social and individual peace.”

The Medellín Documents called for a significant ecclesial shift from comfortability with elitism to solidarity with the poor. It was argued that only from this new position could the

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76 Ibid., # 17.
77 Christine E. Gudorf, “Commentary on Octogesima Adveniens (A Call to Action on the Eightieth Anniversary of Rerum Novarum),” in Modern Catholic Social Teaching, 317.
Church authentically represent a Church of the poor. The formulation of the teaching on the preferential option for the poor was intertwined with an ecclesial renewal that would assist in the teachings development.

Throughout the summary and analyses of the early social encyclicals I have made references to their lack of theological and scriptural credentials. This is not an attempt to undermine the importance or richness of the documents, but rather, an indication that their content was limited by an ethical framework and a constrained understanding of the Natural Law Theory. The Second Vatican Council’s call for a greater historical awareness and scriptural renewal provided Medellín with the capacity to understand that solidarity with the poor was a biblical demand and that if a theology of the poor was to materialise a new theological construct was needed.

**Gustavo Gutiérrez: A Theology of Liberation**

Gustavo Gutiérrez was a theological advisor to the Medellín Conference and had first used the expression “theology of liberation” in a speech at Chimbote, Peru in the late 1960s.78 Gutiérrez argued that although the expression preferential option for the poor did not appear at Medellín the idea did.79 Gustavo Gutiérrez’s *A Theology of Liberation* extrapolates the theological implications of the Medellín documents and offers a new method for doing theology; one that is rooted in the faith experience of the poor themselves. He speaks of

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79 The exact term “preferential option for the poor,” does not appear in the documents but it is clearly illustrated in the document on *Poverty # 9* which reads: “The Lord’s distinct commandment to “evangelize the poor” ought to bring us to a distribution of resources and apostolic personnel that effectively gives preference to the poorest and most needy sectors and to those segregated for any cause whatsoever.”
theology as “critical reflection on praxis”\textsuperscript{80} and begins to articulate why the option for the poor was primarily a theological teaching. \textit{A Theology of Liberation} challenges the Church to speak about poverty in terms of the more politically charged expressions of oppression and liberation. It demanded that taking the position of solidarity with the poor must include confronting the political and economic structural injustices that contributed to their oppression. These confrontations were not based upon political ideology, they were based upon faith.

Gutiérrez’s liberation theology looked at the world from the perspective of the poor and discerned that the poor were victims of an injustice that was contrary to the message of the Gospels. In response to this anti-gospel situation, liberation theology focussed on historical projects that would convert and then direct Church and society toward gospel fidelity.

This book (\textit{A Theology of Liberation}) is an attempt at reflection, based on the gospel and the experiences of men and women committed to the process of liberation in the oppressed and exploited land of Latin America. It is a theological reflection born of the experience of shared efforts to abolish the current unjust situation and to build a different society, freer and more human.\textsuperscript{81}

Liberation theology was written from a Latin America perspective. For Gutiérrez and many other liberation theologians, it was Latin American capitalism that was the unjust structure that needed to be overcome. Liberation theologians were seeking a more democratic system that defended and then encouraged the poor to participate more fully in the political, cultural and economic life of the continent. Many would opt for socialism as the most appropriate system and this would be the cause of great concern within and outside

\textsuperscript{80} “Critical reflection on praxis,” is a method of theology that allows for historical factors to influence theological concepts and pastoral practise.

\textsuperscript{81} Gutiérrez, \textit{A Theology of Liberation}, xiii.
the Church.\textsuperscript{82} While some viewed this tendency toward socialism as a threat to democracy others offered a different perspective. “Contrary to what some interpreters believe, early liberation theology’s espousal of socialism is best read as an attempt to deepen democratic forms of political and economic organization.”\textsuperscript{83}

There were four major aspects of \textit{A Theology of Liberation} which I believe were influential in the formulation of the teaching on the preferential option for the poor. The first was Gutiérrez’s theological method; the second, the introduction of the theological concepts of “integral liberation” and “integral salvation”. Third was his definition of poverty; and fourth, his proposal for a new model of Church.

\textbf{The Theological Method of Gustavo Gutiérrez}

Gutiérrez did not oppose the traditional functions of theology\textsuperscript{84} but he believed they were inadequate to speak to the crushing poverty and misery that a majority of people experienced and suffered from in Latin America. In their stead he argued that an existential commitment from the theologian to the historical conditions that beset the continent would be necessary:

\begin{quote}
The theology of liberation offers us not so much a new theme for reflection as a \textit{new way} to do theology. Theology as critical reflection on historical praxis is a liberating theology, a theology of the liberating transformation of the history of humankind and also therefore that part of humankind – gathered into \textit{ecclesia} – which openly confesses Christ. This is a theology which does not stop with reflecting on the world, but rather tries to be part
\end{quote}

\textsuperscript{82} The Church’s concerns regarding the relationship between liberation theology and socialism will be explained in the following chapter.


\textsuperscript{84} Gutiérrez states that his theology does not replace the traditional functions of theology such as wisdom and rational knowledge but “presupposes and needs them,” (\textit{A Theology of Liberation}, 11).
of the process through which the world is transformed. It is a theology which is open – in the protest against trampled human dignity, in the struggle against the plunder of the vast majority of humankind, in liberating love, and in the building of a new, just, and comradely society – to the gift of the Kingdom of God.  

When Gutiérrez speaks of “critical reflection on praxis” he is speaking of not only critiquing the relevant political and economic realities, but also the Church’s response to those realities. His method poses questions such as: What is the situation? What are the causes of the situation? What is the Church’s response to the situation? In relation to the Church the question could be phrased: “Was the Church practising an ecclesiology that was good news for the poor?” Gutiérrez proposed a historically constituted method that was illuminated by faith. It begins from a situation of poverty and questions the why of this poverty? On answering this question, the theologian, in conjunction with the poor, determine that the situation is not in accord with God’s loving plan. Finally the people allow the Word of God to direct their actions so that they can liberate themselves from their historical situation.

Gutiérrez wanted to emphasise that the inspiration for action in liberation theology was love inspired by faith. He wanted to explore how the Church could communicate effectively to the poor of the world that God and indeed the Church loved them. This would require concrete commitment. “In this light, the understanding of the faith appears as the understanding not of the simple affirmation – almost memorization – of truths, but of commitment, an overall attitude, a particular posture toward life.”

It is vital to Gutiérrez’s theological method that the theologian is engaged in the life of the poor prior to the task of writing his/her theology. “Theologians will be personally and vitally engaged in historical realities and specific times and places. They will be engaged where

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86 Ibid., 6.
nations, social classes and peoples struggle to free themselves from domination and oppression by other nation’s classes and peoples." This concrete practice of solidarity with the poor afforded the poor the opportunity to be interlocutors in the articulation of the theology. In this method the poor could express their faith and insert their previously absent voices into the wider Catholic narrative.

**Integral Liberation and Integral Salvation**

Traditionally the Church had understood liberation in terms of liberation from sin but Gutiérrez expanded this understanding by including historical and political liberation (integral liberation). He acknowledged the primacy of liberation from sin; that this liberation was an unmerited gift of God’s gratuitous love and the primary reason for our salvation. 

Historical and political liberation resulted from human action but this action is inspired by faith and not to be separated from it. In fact, it is God’s grace (unmerited gift) that initiates our action in the world. Gutiérrez seeks to provide a synthesis of God’s liberating action and the collaboration of human beings in the liberating and salvific action of God.

Gutiérrez argued that the biblical commandment to love our neighbour should heighten our awareness of the suffering of the poor and increase our desire to liberate them from that situation. Historical and political liberation is a concrete manifestation of God’s commandment to love our neighbour and this is why Gutiérrez speaks of integral liberation as a historic-salvific act.

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87 Ibid., 10.
88 “Christ the Saviour liberates from sin, which is the ultimate root of all disruption of friendship and of all injustices and oppression.” (A Theology of Liberation, 25)
The liberation from Egypt was a historic-salvific act because it took place within human history and salvific because it was God who set the people free. The participation of the people led by Moses and Aaron was an important component of this liberation. “The liberation of Israel is a political action. It is the breaking away from a situation of despoliation and misery and the beginning of the construction of a just and comradely society. It is the suppression of disorder and the creation of a new order.”

The slavery of the Israelites was a sinful situation. Pharaoh had the opportunity to change this situation but he remained hard of heart. Under God’s direction the Israelites acted; the political liberation began the process toward the covenantal community they were called to be. The Israelites liberation from captivity did not mean that they no longer needed God’s forgiving grace. Their sinfulness would mean that they continually required liberation from sin.

The primacy of God’s gratuitous gift of salvation remains for it is God who invites humanity to participate in this historical salvation and humanity is free to respond. This invitation and response continues throughout history. Gutiérrez does not equate temporal progress to salvation but he argues that faith teaches us that when exploitation and alienation are overcome it is a sign and proclamation of the Kingdom of God; that our actions are important in the history of salvation.

Without liberating historical events, there would be no growth of the Kingdom. But the process of liberation will not have conquered the very roots of human oppression and exploitation without the coming of the Kingdom, which is above all a gift. Moreover, we can say that the historical, political, liberating event is the growth of the Kingdom and is a salvific event; but it is not the coming of the Kingdom, not all of salvation. It is the

89 Gutiérrez, A Theology of Liberation, 88.
historical realisation of the Kingdom and, therefore, it also proclaims its fullness.90

Gutiérrez and a New Understanding of Poverty

In *A Theology of Liberation*, Gutiérrez offered a threefold perspective for a renewed understanding of poverty. In the first perspective he described poverty as a “scandalous condition.”91 He argued that in the Hebrew Testament poverty is defined as a scandalous situation caused by acts of injustice which the prophets condemn (Amos 2: 6-7 and Isaiah 10: 1-2). Gutiérrez says that the same reality applied in the modern age. “Poverty is an evil, a scandalous condition, which in our times has taken on enormous proportions.”92

The second perspective of his understanding of poverty stems from the Medellin document on *Poverty*93 which had sought to expand the Church’s definition of spiritual poverty. Traditional writings on the theme had emphasised a detachment or indifference to material goods but Gutiérrez believed that spiritual poverty is better understood as openness to God; a disposition which allows God to work in us: “Poverty is the ability to welcome God, an openness to God, a willingness to be used by God, a humility before God.”94 Spiritual poverty is a precondition for receiving and acting upon the Word of God and this Word leads to concern, not detachment from those who are materially poor.

Gutiérrez’s third perspective of his renewed understanding of poverty is that it is a commitment of solidarity and protest. Christian poverty that detaches a person from the

90 Ibid., 104.
91 Gutiérrez states: “In the Bible poverty is a scandalous condition inimical to human dignity and therefore contrary to the will of God.” (*A Theology of Liberation*, page 165).
93 See pages 36-37.
94 Ibid., 169.
material world but does not attach them to the poor is neither solidarity nor protest. When one chooses material poverty the dignity is in the choice rather than in the poverty, and if people’s poverty is the result of exploitation, they have had their choice and their dignity removed. To support further this idea of solidarity, Gutiérrez speaks of the image of Christian poverty presented in *Lumen Gentium*:

> Christ was sent by the Father ‘to preach good news to the poor…to restore the broken-hearted’ *(Lk 4:18)*, ‘to seek and to save the lost’ *(Lk 19:10)*. In like manner the Church has a loving embrace for all who are afflicted by human weakness; she goes further: in the poor and the suffering she recognizes the likeness of her founder, a poor man and a sufferer. She makes the relief of their poverty her business, the service of Christ in them her aim.*

**Gutiérrez’s Proposal for a New Model of Church**

Gutiérrez argued that the combination of Western theology and Latin American ecclesiology were ineffective in responding to the poor, and that a new style of evangelisation and a new model of Church was required. A Church, no matter how benevolent, that was aligned to the rich and powerful and dispensing “eternal truths,” to its silent subjects did not practise solidarity or critical reflection on praxis.

In *A Theology of Liberation* Gutiérrez presents five categories which would allow for a new model of Church that would respond more effectively to the needs of the poor:

- **Prophetic Denunciation:** Publicly denounce the injustices that are rampant in Latin America and refer to them as “situations of sin.” This denunciation was an example

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of solidarity with the poor and publicly displayed a disassociation with the prevailing unjust order.

- **Conscientising Evangelization**: In making a determined effort to educate the poor to become agents of their own change, the Church would in fact address the oppressed rather than the oppressors. This was offered as an example of solidarity with the poor and another disassociation from the powerful.

- **Poverty**: Gutiérrez wanted to emphasise that the goal was not just a Church of the poor, but a Church that is poor. The Church’s real estate and the lifestyle of some of its clergy needed to be changed in order for the Church to practise a concrete solidarity with poor.

- **Changing Structures of the Church**: It was clear to those who lived and worked among the poor that Church structures were antiquated and outmoded. They were hierarchal and distant from the lives of the poor. Gutiérrez’s evangelisation to the poor was more than new pastoral practises; it was a new way of being Church and required Church structures that reflected this closeness to the poor.

- **Lifestyle of the Clergy**: If the Church was to practise greater solidarity with the poor, its pastors needed to be at the forefront. Gutiérrez proposed that formation programs should encourage clergy to be truly present to the people with whom they live and minister. This would assist pastors to respect the “deposit of faith,” evident in the people of God and include lay people in the pastoral decisions of the Church.  

Gutiérrez’s theological method, his definition of poverty and his proposal for a new model of Church were aimed at moving the Church beyond a charitable response to poverty, and

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toward one which would see an option for the poor becoming integral to the identity and mission of the Church.

### Further Contributions to the Development of the Preferential Option for the Poor: The People of God and Basic Ecclesial Communities

There were two other important contributors to the formulation of the preferential option for the poor that I would like to highlight. The first was the Vatican II definition of the Church as the “People of God.” The second, which I would argue is a concrete manifestation of this definition, was the establishment of the Basic Ecclesial Communities (BECs) in the Latin American Church. Both these contributions were embraced by Medellín and Gutiérrez.

Vatican II started its own internal restructuring of the Church when it defined her as the “People of God.” This definition elevated the status of the laity and was pertinent to the renewal of the Church in Latin America:

Vatican II produced numerous and far-reaching reform, but perhaps the most important for future developments in Latin America was the redefinition of the church as a community of believers – the “people of God.” The expression conveyed the biblical image of the Hebrew people in exodus, and for the church of Vatican II it symbolized a community on the move in search of a deeper understanding of faith.

Gutiérrez welcomed this definition believing that it provided an interpretation that would more readily encourage lay participation in ecclesial renewal. His theological method encouraged the poor to participate in the mission of the Church and a concrete manifestation of their participation was the BECs.

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97 Chapter II of the Vatican II document *Lumen Gentium* is titled “The People of God.”
The BECs were a grassroots movement and in the case of Latin America they were generally made up of poor people. They were faith-based communities who looked to the Bible and CST for inspiration and sought to change the injustice of their situation. Their methodology was similar to the Cardijn “see-judge-act” process, with an emphasis on the community to engage in activities that would liberate themselves from their unjust situation.

A new model of church is appearing from the base communities of Latin America today: the church of the poor. This church is not a new church, but a new way of conceptualizing and organizing the church. The basic mission of this new model of church is to make God credible in this world of the poor and oppressed third-world masses. The basic ecclesial communities are the primary force in the construction of this new model of church. They are its most visible and extensive part.99

The BECs used the bible and Church teaching as guides but they also sought to synthesise faith with everyday life. Their own historical experience became a locus for theological reflection and an impetus for pastoral action. Gutiérrez writes: “These communities are a major source of vitality within the larger Christian community and have brought the gospel closer to the poor and the poor closer to the gospel – and not only the poor but, through them, all are touched by the church’s action, including those outside its boundaries.”100

The Medellín Conference and liberation theology exposed serious flaws in the Latin American Church’s historical response to the poor. An argument could be presented to suggest they revealed similar shortcomings in the universal Church. Despite CSTs advocacy on behalf of the poor, the Church in Latin America and in other parts of the world, rested easily in the bosom of power and wealth. When Pope John XXIII called for a Church of the poor it was the Church’s own comfortable position that needed to change. It was Medellín

100 Gutiérrez, A Theology of Liberation, xli.
and liberation theology who proposed a model of Church that reflected that change. They proposed a Church that was not aligned with political and economic elites, embellished in clericalism, or serving the poor from a distance. They concluded that a Church of the poor required a considerable shift in the Church’s structures and practises. Gutiérrez changed theological history by writing from the perspective of the poor and this poor perspective led him to believe that ecclesial reform was necessary.

When speaking about true reform in the Catholic Church, Yves Congar wrote: “We would see then how in the church there is a complementarity between a principle of continuity or form coming from the hierarchy, on the one hand, and a principle of movement or unexpectedness, even, coming from those inspired to act in the frontiers.” The reform initiated by the Second Vatican Council (hierarchy) proceeded to the Medellín Conference (hierarchy) and then to the majority poor in the Latin American Church (frontier). The BECs were an ecclesial representation of the frontier Church.

The methodology of liberation theology begins with praxis and this engagement with the life and faith of the poor led to a theology influenced by the frontier of the Church. The frontier was now in a position to influence the centre. Rather than impose upon the frontier, the Second Vatican Council and Medellín opened up a dialogue which afforded the poor a voice and therefore the capacity to influence. All aspects of this reform process occurred within the wider framework of the Church’s operations.

The CELAM Conference at Medellín and Gutiérrez’s liberation theology did not set about to find a new church, they were calling for reform within the Church. Any movement toward reform calls for change, and the change needed in Latin America was for the Church to

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101 Congar, True and False Reform in the Church, 184.
withdraw from their alignment with the countries’ elite and attach themselves to the poor.

“Christianity is not being called into question. In a sense, the whole point of the reform effort is to focus on Christianity. What is being questioned are certain features of the historical profile that the church received from another world, different from the one we live in.”  

Part III: The Preferential Option for the Poor and Liberation Theology: Initial Vatican and Latin American Responses

The initial Vatican response to liberation theology was fairly positive. The documents *Octogesima Adveniens* (OA), *Justitia in Mundo* (JM), and *Evangelii Nuntiandi* (EN) were published during the Papacy of Paul VI and demonstrated the Church’s continuing concern for the poor and its expanding notion of justice. The preferential option for the poor was not yet official Church teaching but it was becoming part of the vocabulary of Church documents, and as such progressing toward official Church acceptance.

**Octogesima Adveniens (After Eighty Years) (1971)**

*Octogesima Adveniens* (OA) was an apostolic letter. The document acknowledged the importance of synthesising the Gospel with historical reality and affirmed that localised...
knowledge was the best determinant in implementing appropriate pastoral action. “It is up to the Christian communities to analyse with objectivity the situation that is proper to their own country, to shed on it the Gospel’s unalterable words and to draw principles of reflection, norms of judgement, and direction for action from the social teaching of the Church.” This directive allowed local communities to become the locus between tradition and situation and respected their ability to discern effective action in relation to, rather than reliance on, magisterial teaching. This approach is concordant with the ideas expressed in Gutiérrez’s theological method of “critical reflection on praxis,” and the Vatican II definition of the Church as the people of God. The document encouraged people to be agents of their own change and promoted an inductive method of determining pastoral responses.

OA recognised that political action which led to the empowerment and liberation of the poor could be inspired by faith:

Virtually all analysts agree that the most distinctive innovations of OA revolved around a pronounced shift from economic to political perspectives in the pursuit of justice, accompanied by a related shift from the claims of universal authority on the magisterium to expectations that solutions emerge from local contexts.

In OA Pope Paul VI acknowledged the biblical basis for an option for the poor. “The Gospel instructs us in the preferential respect due to the poor and the special situation they have in society. The more fortunate should renounce some of their rights so as to place their goods more generously at the service of others.”

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107 OA, # 4.
108 Christine E. Gudorf, “Commentary on Octogesima adveniens,” in Modern Catholic Social Teaching, 315.
109 OA, # 23.
**Justitia in Mundo (Justice in the World) (1971)**

In 1971 a synod was held in Rome which included a number of bishops from developing nations. Many of these bishops had been present at the Medellín Conference and their experience ensured that the document contained a developing world perspective. The synod produced the document *Justitia in Mundo* (JM) which was first published in Italian on December 9\(^{th}\) 1971.

The synod described the situation in the developing world in terms of domination, colonialism, and oppression. It argued that liberation was the appropriate response to these injustices. The document declared that social justice was not peripheral to the Church’s mission: “Action on behalf of justice and participation in the transformation of the world fully appear to us as a constitutive dimension of preaching the Gospel, or, in other words, of the Church’s mission for the redemption of the human race and its liberation from every oppressive situation.”\(^{110}\)

The bishops believed that unjust and oppressive structures were a threat to the common good and in direct opposition to God’s plan. They stated that transforming the situation of the poor foreshadowed the “glorious transformation” inaugurated by God for all creation and therefore related the historical pursuit of justice to salvation. There is a distinct connection between the absolute and temporal good of which the pursuit of justice plays a part. This connection is in accord with Gutiérrez’s definition of integral liberation and integral salvation.\(^{111}\)

\(^{110}\) JM, # 6.

\(^{111}\) See pages 44-46.
While JM does not offer any specific criteria by which the Church could transform the situation of the poor, there was a call for the Church to be a witness for the poor.

The Church should never give mixed messages regarding its material possessions. While it is difficult to draw a line between appropriate possessions and prophetic witness, we must keep firm the principle that our faith demands we use our possessions sparingly. The Church must live and use goods so that the Gospel is proclaimed to the poor. If the Church appears to be among the rich and powerful it loses its credibility.¹¹²

**Evangelii Nuntiandi (Evangelization in the Modern World) (1975)**

*Evangelii Nuntiandi* (EN) was an apostolic exhortation¹¹³ that emphasised that salvation is God’s gift to humanity and that this gift reaches its fulfilment in eternity. The document seemed to express a concern from some Church quarters that the perceived ‘ politicisation’ of the Gospel evident in liberation theology would lead to the temporisation of salvation:

Her (the Church’s) activity, forgetful of all spiritual and religious preoccupation, would become initiatives of the political or social order. But if this were so, the Church would lose her fundamental meaning. Her message of liberation would no longer have any originality and would easily be open to monopolization and manipulation by ideological systems and political parties.¹¹⁴

EN did however acknowledge that faithful evangelisation required a Gospel witness that expressed and practised a deep concern for humanity’s suffering and it spoke of the connection between evangelisation and liberation.

We rejoice that the Church is becoming ever more conscious of the proper manner and strictly evangelical means that she possesses in order to collaborate in the liberation of many. She is providing these Christian

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¹¹² JM, # 47.

¹¹³ An apostolic exhortation is a papal encouragement to the faithful to engage in a particular activity. It is not defined in terms of being an official doctrine of the Church.

¹¹⁴ EN, # 32.
“liberators” with the inspiration of faith, the motivation of fraternal love, a social teaching which the true Christian cannot ignore and which he must make the foundation of his wisdom and his experience in order to translate it concretely into forms of action, participation and commitment.  

EN is the first Church document to speak of the Church’s liberating mission. The text ratifies the primacy of liberation from sin but speaks also of liberation from all that oppresses man. EN # 30 is titled *A Message of Liberation* and references the earlier document *Justitia in Mundo* (JM). “The Church, as the bishops repeated (JM), has the duty to proclaim the liberation of millions of human beings, many of whom are her own children – the duty of assisting the birth of this liberation, of giving witness to it, of ensuring that it is complete. This is not foreign to evangelization.”

I believe that these three documents indicate that while Pope Paul VI did not officially endorse liberation theology, he displayed openness toward it. More importantly the Pope displayed an acceptance of the theology’s directive for an option for the poor. OA in particular exemplified a trust in the people of God, and promoted their capacity to facilitate faith in action.

**The Latin American Church from the Medellín Conference (1968) to the Conference in Puebla (1979)**

Medellín and liberation theology had very specific contextual origins and although their insights had universal ramifications, their writings called for a radical shift from alliance with the economic and political elites to solidarity with the poor in the Catholic Church of Latin America. The following section traces the localised debates that ensued in relation to that radical shift.

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115 EN, # 38.
116 EN, # 9.
Between Medellín and Puebla the economic and political difficulties in many Latin American countries worsened. Military dictatorships had gained power in a number of countries imposing a doctrine of national security. This doctrine claimed to promote security but these “security measures,” gave military regimes the power to clamp down on any form of dissent. The military regimes were more often than not vehemently anti-communist and would eventually face accusations of human rights abuses. They did however find an ally in the more conservative elements of the Catholic Church. “Religious legitimization of certain regimes which violate human rights is evident. We could cite many well-known cases, published by the governments themselves, of bishops who support oppression considering it necessary to combat the Marxist threat.”

While the CELAM meeting in Puebla would ratify Medellin’s thrust toward a preferential option for the poor and articulate the expression preferential option for the poor, an internal struggle influenced by a conservative and anti-liberation theology element both in Latin America and Rome was apparent both prior to and during the Puebla Conference. In 1972 Archbishop Alfonso Lopez Trujillo was elected general secretary of CELAM and held that position until 1984. Lopez Trujillo was a conservative who attacked liberation theology believing it contradicted the true teaching on salvation which had permanent value only if salvaged from politics.

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118 Chapter 1 of the Puebla Documents is titled A Preferential Option for the Poor. It states: “With renewed hope in the vivifying power of the Spirit, we are going to take up once again the position of the Second General Conference of the Latin American episcopate in Medellín, which adopted a clear and prophetic option expressing preference for, and solidarity with, the poor. We do this despite the distortions and interpretations of some, who vitiate the spirit of Medellín, and despite the disregard and even hostility of others. We affirm the need for conversion on the part of the whole Church to a preferential option for the poor, an option aimed at their integral liberation.” Puebla # 1134.

119 Gutiérrez and other liberation theologians had been present at Medellín but were not invited to Puebla. The Puebla Documents make no reference regarding liberation theology’s contribution to the formulation of the preferential option for the poor.
The first and most serious challenge to early liberation theology was its association with Marxist-socialism. There is no doubt that for a number of theologians and church-workers in Latin America a preferential option for the poor led to an alignment with socialist ideology. In their defence the Christian socialist movement claimed they were seeking responses to poverty, not promoting atheism. “The Christians for socialism, to put it simply, are not fighting against the Church or against the bishops, but against a system of domination which engenders underdevelopment and extreme poverty. Confrontations take place in the measure that this Church or Christians are tied to the system of domination.”

The institutional Church was under fire for its alignment with the status quo which left the poor in an unchanging position, but if Christian socialists were aligned with a socialist ideology were they not in danger of promoting class-conflict and revolution, thereby reducing the Church to a political movement? In the early 1970s the Christians for Socialism did propose the realization of a Marxist socialist society:

In this matter, our Movements recognize the contribution of Marxism, insofar as the latter aims at a scientifically rational history connected with praxis that constructively transforms the project of a new and different society. We accept Marxism as a theory and praxis that are indispensable if our Christian love is to take concrete form.

The Christian socialist movement believed that socialism was a more appropriate model to assist the poor in Latin America, than the capitalism evident at the time.

While the Marxist-socialist question would remain a point of contention within the Latin American and universal Church, there were other issues of an ecclesial and procedural nature that also caused tensions. Prior to the Puebla Conference preparatory documents

120 Pablo Richard, “Iglesias Popular: A Church Born of the People’s Struggles,” in The Church at the Crossroads, 118.

were produced which drew strong criticisms from various scholars and organisations. The Latin American Confederation of Religious stated:

The entire exposition of the theological framework is doctrinal and proceeds from top to bottom. It displays almost no sensitivity to the historical and conflictual dimension in which revelation is entrenched and expressed. It must be asked: what determined this option for a deductive and doctrinal approach when, since the council, in *Gaudium et Spes* and in the theological reflections of our churches, one always begins from the praxis of faith and from the relevant data of reality? Beginning with reality, it is impossible to ignore the conflicts and ruptures which faith decodifies as the presence of sin and negation of God’s plan in history.\(^{122}\)

As has already been stated in this chapter, an important component in the formulation of the preferential option for the poor was the definition of the Church as the “People of God.” In Latin America a vast number of these people were poor and the methodology of liberation theology encouraged these faith communities (especially via the BECs) to be places of theological reflection. For the more conservative elements in Rome and Latin America this raised questions of orthodoxy.\(^{123}\) Those who supported this new model called for openness and trust:

Far from fearing them, from viewing them with suspicion, from stifling their spontaneity through excessive control which would be synonymous with paralysis and death, let us give them the credit of trust. To frighten ourselves with abuses that may arise here and there would be to forget that no institution, no age, was free from filtration, from abuses.\(^{124}\)

Pope John Paul II became Pope in 1978 and gave an address to the participants of the Puebla Conference prior to its commencement. He spoke of the positive elements of

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\(^{122}\) Latin American Confederation of Religious, “Questions for Puebla”, in *The Church at the Crossroads*, 57.

\(^{123}\) In Pope John Paul IIs opening address to the Puebla Conference he stated: “At the level of content one must consider how faithful they are to the Word of God, to the Church’s living tradition, and to the magisterium. As for attitudes, one must consider what sense of communion they feel, with the bishops first of all, and then with the other sections of God’s people.” Puebla, 13.

\(^{124}\) Dom Helder-Camara, “Opinions,” in *The Church at the Crossroads*, 175.
Medellín but also stated there had been incorrect interpretations. “So it will have to take Medellin’s conclusions as its point of departure, with all the positive elements contained therein, but without disregarding the incorrect interpretations that have sometimes resulted and that call for calm discernment, opportune criticism, and clear-cut stances.”

The address did not specify problems but Mary Elsbernd offers some conclusions based on what is not in the speech. “There is no reference to local Christian communities observing the local situation; there is no reference to judging these situations in the light of the Gospel and social teaching; and there is no reference to discernment of the options and commitment necessary to effect change.”

Elsbernd concluded that the missing elements predicated a diminishment of the role of the local community and a return to social doctrine being the task of the magisterium. The expansive attitude evident at the Second Vatican Council, which had been instrumental in the evolution of the teaching on the preferential option for the poor, was being curtailed and a more authoritarian style of papacy was beginning.

Between Medellín and Puebla, divisions at both local and international levels were apparent but the focus of these divisions was not clear. Was it purely opposition to liberation theology and its association with Marxist-socialism, or was it a protest against a grass roots inspired ecclesial change? Alternatively, were these simply the predictable struggles of a Church which had not yet clarified what being a Church for the poor really entailed? It was the life and death of Saint Oscar Romero which brought these questions to the fore. Romero was a paradigm for what taking a preferential option for the poor in a land of oppression

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125 Puebla, Conclusions, 1.
entails. He was also representative of the theological and ecclesial tensions that this commitment created within the local and universal Church. The negative Vatican response to the mission and life of Romero was, I believe, an example of how the Vatican was manoeuvring itself into a position to detach the preferential option for the poor from its theological origins. This line of argument will be addressed in the following chapter.

Part IV: Saint Oscar Romero (1917-1980)

Prior to his appointment as Archbishop of El Salvador in 1977, Oscar Romero had been Rector of a seminary, editor of a diocesan newspaper and secretary-general of the national bishop’s conference. When he was bishop of Santiago de Maria he had shown a propensity to support the poor but his overall image was one of conservatism. He had attacked the “liberationist” tendency of Jesuit education referring to it as a mutilation of Medellin and he was acquainted with and supportive of the conservative movement Opus Dei.¹²⁷ He was also a defender of the establishment and reluctant to blame the government for the social unrest in El Salvador. It was the murder of his friend, the Jesuit priest Rutilio Grande, whom he called a messenger of liberation that sparked his transformation. What Romero would ultimately teach is that the preferential option for the poor was not an easy option to practise; it took a commitment that put both the individual and the institution at risk. He fully employed Gutiérrez’s threefold definition of poverty¹²⁸ and in doing so offered the Church an example of a new and radical form of discipleship.

A unique aspect of Romero’s theological and pastoral approach was his weekly radio broadcasts. The talks/homilies integrated scripture, weekly news and theological reflection.

¹²⁸ See pages 46-47.
The news included the atrocities perpetrated in El Salvador and this condemnation of government sponsored violence saw him labelled as a Marxist sympathiser and a threat to national security. Romero believed that building a more just society was in keeping with God’s plan of salvation (integral salvation) and that the Church needed to be a sign and sacrament of God’s love working in history.

The response by authorities in El Salvador to those who challenged their position was violent and this placed the Church in a precarious position. While Romero was painfully aware of the dangers his solidarity and protest with the poor created, he believed that this was the price to pay for a courageous witness to the Gospel message:

I rejoice, brothers and sisters, that our church is persecuted precisely for its preferential option for the poor...How sad it would be, in a country where such horrible murders are being committed, if there were no priests among the victims! A murdered priest is a testimonial of a church incarnate in the problems of the people...A church that suffers no persecution, but enjoys the privileges and support of the powers of the world – that church has good reason to be afraid! But that church is not the true church of Jesus Christ.  

Romero’s outspoken leadership on behalf of the poor led to a number of conflictual situations. There were three areas of dissension that I will highlight. The first was with the El Salvadoran authorities; the second was with the government of the United States; the third was the conflict with the Church itself.

**Conflict One: The El Salvadoran Authorities:** After the death of Fr Grande and his companions, Romero decided to protest the government’s persecution of that element of the Church that was in solidarity with the poor. He closed the Catholic schools and asked Church representatives to absent themselves from any public function that supported...
government agencies. He also decided that the following Sunday there would be only one Mass in the archdiocese and that was to be at the Cathedral. He invited the people to come as a sign of protest and solidarity and many thousands did so. Romero also refused to attend the inauguration of the new president of El Salvador although the papal nuncio and other bishops chose to do so.

In his weekly radio addresses Romero condemned the brutal and repressive tactics of the security forces and further enraged the elite by encouraging peasant unions to fight for their rights. A Church that had long been a “friend” of political and economic elites had, according to old allies changed sides. This change was however faithful to the declarations of Medellín, to the basic tenets of liberation theology and a clear option for the poor.

**Conflict Two: The United States Government:** The second area of conflict was the antagonism between Romero and the foreign policy of the United States. Romero wrote to President Jimmy Carter asking him to stop aiding the El Salvadoran military saying that it was contributing to injustice and repression. At the same time, the U.S. ambassador to El Salvador made formal complaints against Romero to the Vatican. The United States was fighting against the expansion of Communism and its policy was that military dictatorships sympathetic to and supported by the USA were best placed to achieve this end. Liberation theology was seen as a threat to this policy.

One of the prime toeholds of Marxism in Latin America was perceived to be Liberation Theology. The years 1975-1979 saw the full force of the counter-attack on this theology of empowerment of the poor by the CIA and the Vatican. In this period the CIA created a special unit devoted to working with the Catholic Church. It passed money to large numbers of sympathetic
bishops and priests. It also supplied information about hundreds of radical priests and nuns who became victims of military dictatorships.\textsuperscript{130}

Romero was assassinated on March 24th 1980, and on December 2\textsuperscript{nd} that same year, American lay missionary Jean Donovan and three American Religious women, Ita Ford, Maura Clark and Dorothy Kazel were raped and/or murdered. In El Salvador, Church workers defending the poor became targets of a USA-backed government. The Vatican was cooperating with the USA in its efforts to combat the spread of Communism and in the process abandoned many of its own workers.

In 1980 a group called the Committee of Santa Fe prepared a document for President Ronald Reagan urging him to act against the theology of liberation. Writing decades later Cardinal Gerhard Ludwig Muller stated: “Alarming in this document is the insensitivity with which representatives of brutal military dictators and powerful oligarchies – the representatives responsible for this document – make their interest in private property and capitalist production into the criterion for which is to be valued as Christian.”\textsuperscript{131} While the right to private property has been an important component of CST, the private property owners referred to in the Santa Fe document were giant estates and mines, not small farm holdings. The Christianity they allude to is not one found in CST.

**Conflict Three: With the Catholic Church.** The last and perhaps most painful conflict for Romero was the antipathy toward him within the hierarchal Church. Romero’s decision to protest after the murder of Fr Grande and his companions incurred the wrath of the papal nuncio and his decision to forego the presidential inauguration was complicated by Bishop Alvarez who attended and argued that there was no persecuted church, but rather, some

church people operating outside the law. Another member of the El Salvadorian episcopate, Bishop Revelo represented the bishops of his country at a synod in Rome (1977) and spoke of the Marxist tendencies of some of the local clergy. He also bemoaned the lack of proper Catholic formation because of the emphasis on social action. In Rome the Prefect of the Congregation of the Bishops, Cardinal Baggio, expressed his disappointment at Romero’s performance as Archbishop, complaining about the quality of candidates in the seminary and his poor relationship with the nuncio.

After the election of Pope John Paul II the nuncio in El Salvador held a reception in honour of the newly elected Pope. The guest list included civil and military leaders and Romero refused to attend. In a private audience with Pope John Paul II, the Pope suggested to Romero that the El Salvadorian Church would benefit from an apostolic administrator; a position that undermined Romero’s leadership. Romero objected but the complaints from his fellow bishops continued to filter through to the Vatican. Their complaints ranged from accusations of his radio broadcasts fomenting class warfare, collaborating with Marxist criminals, undermining the El Salvadorian Church hierarchy, and seeking international renown.

The ultimate division among the El Salvadorian Church hierarchy occurred at Romero’s funeral. Despite bishops from all over the world attending only one from El Salvador was present. The Pope sent a representative and among the crowd there was a banner which told the military junta, the US Ambassador and the bishops who had opposed Romero that they were not welcome. For bishops to be publicly named and equated with the military and a “questionable,” foreign power displayed not only the level of feeling among the “people of God,” but how distant the Church hierarchy was from these people. The controversy
surrounding Romero continues to this day with Pope Francis saying to a Church delegate from El Salvador in 2015: “He (Romero) was defamed, slandered, his memory despoiled, his martyrdom was contrived, even by his own brothers in the priesthood and the episcopacy.”

Romero’s death was difficult for a Church which is built on the “blood of the martyrs.” He and many others were killed by forces, some of which were aligned with powerful people in the Church. Romero’s concrete solidarity with the poor and oppressed was a bridge too far for the Church in Rome and many of El Salvador’s episcopal leaders. From the perspective of this thesis, a fundamental question arises in relation to an effective understanding and application of the teaching of the preferential option for the poor. Was Romero an authentic practitioner of the teaching in a Church incapable of and unwilling to follow his lead, or was he a zealot who recklessly led his people into danger via a false application of the teaching?

The teaching of the preferential option for the poor was still finding its feet during Romero’s time but to have one of its boldest advocates isolated by the Roman curia and ostracised by his fellow bishops was a warning of how divisive the liberationist understanding and application of the preferential option for the poor could be. After decades of what could only be described as Vatican isolation, the life and legacy of Romero has finally found its way in to the official Church narrative. His life and mission has been recognised as one of great faith, and he is now recognised as a saint and martyr.

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**Summary and Transition**

The ever growing and evolving body of CST that began with *Rerum Novarum* in 1891 has provided the whole Church with a rich heritage, upon which all its members can adduce their own commitment and participation in the social justice mission of the Church. A consistent theme throughout the evolution of CST has been the Church’s concern for the poor. Whether it was in the form of greater personal virtue, extended charity, greater respect for human rights or a more just distribution of the world’s goods, there was an attempt to transform people and society. The biblical renewal promoted at the Second Vatican Council began to focus on God’s love for the poor but the Church had still not transitioned to focus on the struggle of the poor in the process of their own liberation and it was to this latter process that the Medellín Conference and Gutiérrez’s *A Theology of Liberation* addressed themselves. Christine Gudorf explains: “The social teaching therefore affirms the epistemological privilege of the poor unconditionally while liberation theologians deny that the condition of poverty without struggle against it confers any privilege. It is the engagement of the poor in the struggle for liberation which confers their epistemological privilege.”

Medellín and liberation theology were controversial on a number of fronts. First, they challenged the institutional Church to withdraw from its place of prestige and power. They believed that the Church’s peaceful co-existence with civil authorities had emaciated the dangerous memory and radical mission of Jesus Christ. Though the accusation of Marxist-socialist tendencies needed to be addressed, the question of why the Church had rested comfortably in the bosom of power and prestige and not on the side of the poor should

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have been the cause of reflection, shame and transformation. Why did a Catholic continent with so many of its people suffering poverty and oppression take so long to reach this option? What model of Church allowed for this ignorance and what changes needed to be implemented to avoid its recurrence? Gutiérrez had at least set forth some concrete proposals.\(^{134}\)

Medellín and liberation theology recognised the power of the poor and trusted in their capacity to evangelise. This had implications for the Church and society – for people previously spoken to, must now be listened to.

If the poor and oppressed are silenced because of the claim that atheistic movements and ideologies were filtering through the protests of the oppressed, the response accuses Christians even more, it shows their incapacity to hear the cry of the poor, to raise their voices and unite their efforts with the oppressed to obtain their liberation.\(^{135}\)

The CELAM Conference at Puebla ratified the preferential option for the poor as a central focus of the Latin American Church. This continuity of the Medellín Conference and the major thrust of liberation theology did not however diminish the divisions that had arisen in Latin America and the growing concerns expressed in Rome regarding liberation theology. The life and death of Saint Oscar Romero was evidence of this division. There was evidence in Rome and Latin America of a desire to return to a more authoritative model of Church and the post Puebla period would offer further confirmation of this direction.

The following chapter will concentrate on the years spanning 1980-1988. It is in this era (specifically 1984) that I believe the Church acknowledged the preferential option for the poor as official Church teaching. Ironically, it coincided with Rome’s expanding critique of

\(^{134}\) See pages 47-49.

\(^{135}\) Ricardo Antoncich, “Evangelization in Latin America and Human Rights,” in *The Church at the Crossroads*, 101
liberation theology. Liberation theology was a new theology and as such was subject to the scrutiny of the Sacred Congregation for the Doctrine of the Faith (SCDF).\textsuperscript{136} This scrutiny, which began with a cautious but affirming tone, would ultimately deteriorate and it is this deterioration that would see the teaching on the preferential option for the poor detached from its liberation theology origins. This deliberate detachment would leave the teaching in an uncertain position.

\textsuperscript{136} The Sacred Congregation for the Doctrine of the Faith (SCDF) is the organisation within the Roman Curia that is tasked with promulgating and protecting Catholic doctrine. All new theologies or Church movements would be scrutinized for doctrinal and theological orthodoxy by this body.
Chapter Two

The Detachment of the Preferential Option for the Poor from its Roots in Liberation Theology (1980-1988)

The previous chapter argued that while Catholic Social Teaching and the Church renewal inaugurated at the Second Vatican Council contributed to the formulation of the preferential option for the poor, it was more fully developed by the Medellín Conference and Gustavo Gutiérrez’s publication of *A Theology of Liberation*. It is however, my contention that it was the 1984 Sacred Congregation for the Doctrine of the Faith’s document titled *Instruction on Certain Aspects of the Theology of Liberation* that consolidated the preferential option for the poor as a teaching within the lexicon of Catholic social doctrine. The *Introduction* to this 1984 document states that the preferential option for the poor is the result of an “authentic evangelical spirit.”¹

This second chapter will be divided into two parts. The methodology of the first part is dialogical. I will explain the major concerns presented by the Magisterium in relation to the theology of liberation in *Instruction 1* and then offer a response to those concerns from a liberation theology perspective. This method will be repeated for the 1986 publication, *Instruction on Christian Freedom and Liberation*.² The 1986 document was intended well before its publication with the *Introduction* in *Instruction 1* stating: “The Sacred Congregation for the Doctrine of the Faith does not intend to deal here with the vast themes of Christian freedom and liberation in its own right. This it intends to do in a

¹ Sacred Congregation for the Doctrine of the Faith (SCDF), *Instruction on Certain Aspects of the Theology of Liberation* (Homebush NSW: St Paul Publications, 1984), # 8. (Hereafter this document will be cited as *Instruction 1*).
² Sacred Congregation for the Doctrine of the Faith, *Instruction on Christian Freedom and Liberation* (Homebush NSW: St Pauls’ Publication), 1986. (Hereafter this document will be cited as *Instruction 2*).
subsequent document which will detail in a positive fashion the great richness of the themes from the doctrine and life of the Church.”

This first part will conclude with a review of the social encyclicals issued by Pope John Paul II between 1980 and 1988. All of these publications will be examined in reference to their impact on the teaching of the preferential option on the poor.

The second part will concentrate on the evolving work of Gustavo Gutiérrez. Despite the Vatican’s hostility, Gutiérrez continued to articulate and expand liberation theology and his understanding of the teaching on the preferential option for the poor. The chapter will conclude with my appraisal of how the teaching was situated by the end of the 1980s.

Part I: Rome’s Official Response to Liberation Theology

*Instruction on Certain Aspects of the Theology of Liberation* acknowledged the credentials of the teaching on the preferential option for the poor, but offers a negative critique of the teaching’s major contributor, liberation theology. This document detached the teaching from its origins in liberation theology, and it is my argument that this detachment significantly diminished the teachings impact and influence on the universal Church. The evidence for this claim is contained in Church documents, episcopal appointments and the historical tensions within the Latin American Church.

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3 *Instruction* 1, # 9.

4 Arthur McGovern in the book *Liberation Theology and its Critics* writes: “Since Pope John Paul II came to office, he has replaced progressives with conservatives in nine of Brazil’s thirty-six archdioceses, with only three progressive bishops appointed during the same period. The diocese of Recife and Olinda, for years one of the most progressive diocese in Brazil, now has a conservative bishop. Peru, I am told now has seven Opus Dei bishops. The bishop of Cusco has dismantled social centres once looked upon as models of work for change. The new head of the Bishops Conference in Peru, Bishop Riccardo Durand, is one of the fiercest critics of liberation theology.” (Maryknoll, NY: Orbis Books, 1989), 231.
Instruction 1 does not specifically refer to any one theologian, preferring to address itself to the broader and more generic term the theology of liberation. This makes Instruction 1 difficult to critique and I preface the responses I offer in the ensuing pages as having being written from the perspective of the writings of Gustavo Gutiérrez.

Instruction 1 outlines seven major areas of concern regarding the theology of liberation; the areas of concern that follow are not presented in any particular order of importance.

Concern 1) The Primacy of Liberation from Sin: Instruction 1 states that the greatest evil is sin and that the primary liberation for human beings is freedom from sin. This liberation is an ongoing process and is dependent upon God’s gratuitous love, not social transformation.

“The radical experience of Christian liberty is our first point of reference. Christ, our Liberator, has freed us from sin and from slavery to the law and to the flesh, which is the mark of the condition of sinful mankind. Thus it is the new life of grace, fruit of justification which makes us free.”

The document acknowledged the social effects of sin, but there was a warning to liberation theology that social liberation should not be elevated above personal liberation. “The demand first of all for a radical revolution in social relations and then to criticize the search for personal reflection, is to set out on a road which leads to the denial of the meaning of the person and his transcendence.”

Response: Gutiérrez challenged a privatised faith that could be lived and practised separated from the facticity of one’s situation. For Gutiérrez, it was only when we entered into the lives of the poor that we could understand their existential situation and then practise a preferential option for them. He elevated the status of political and historical liberation because he determined that sin was evident in oppressive structures, not just

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5 Instruction 1, # 17.
6 Instruction 1, # 22.
people’s individual lives. He did not deny the primacy of liberation from sin which he acknowledged was dependent on God’s unmerited love, not social action.\footnote{In \textit{A Theology of Liberation}, Gutiérrez writes: “Christ the Saviour liberates from sin, which is the ultimate root of all disruption of friendship and of all injustice and oppression.” 25.}

**Concern 2) Use of Marxist Philosophy:** In an attempt to understand the economic depravity in which many Latin Americans were immersed, Gutiérrez and many other liberation theologians borrowed aspects of Marxist economic and political theory. The \textit{Introduction} to \textit{Instruction 1} sets the tone of the Magisterium’s vehement opposition to anything pertaining to Marxism:

> The present \textit{Instruction} has a much more limited and precise purpose: to draw the attention of pastors, theologians, and all the faithful to the deviations, and risk of deviations damaging to the faith and to Christian living, that are brought about by certain forms of liberation theology which use, in an insufficiently critical manner, concepts borrowed from various currents of Marxist thought.\footnote{\textit{Instruction 1}, # 9.}

The Magisterium went on to argue that any philosophy that is atheistic and openly anti-Christian could not possibly have as its goal anything that resonates with the salvific hope of Christianity:

> Let us recall the fact that atheism and the denial of the human person, his liberty and his rights, are at the core of the Marxist theory. This theory, then, contains errors which directly threaten the truths of the faith regarding the eternal destiny of individual persons. Moreover, to attempt to integrate into theology an analysis whose criterion of interpretation depends on this atheistic conception is to involve oneself in a terrible contradiction.\footnote{\textit{Instruction 1}, # 34.}

CST has consistently opposed Marxist-socialism so the \textit{Instruction 1} critique is hardly surprising. What the document intimates is that any use of Marxist analysis would inevitably lead to an understanding of the human person separated from any reference to God.
Response: There was an unquestioned leaning to socialism among many liberation theologians including Gutiérrez. These advocates were however seeking a system that would be beneficial for the poor and did not see an “inevitable” shift to atheism. They had lost faith in the capitalism practised in the continent and believed that Christianity and socialism could find common ground. Gutiérrez would ultimately come to acknowledge his misplaced faith in socialism but the inspiration for his theology was the life and mission of Jesus, as well as the poor among whom he lived with and ministered to, not Marxism. The Magisterium’s concern has validity, but to suggest that the use of Marxist analytical methods would inevitably progress toward atheism was a dubious conclusion. The focus on the “evils” of Marxist-socialism masked the Church from investigating its own inadequacies in relation to its protection of and liberation for the poor. Gutiérrez and the many other liberation theologians were operating inside a Church that was recognised as compliant with the rich and powerful and for many of the poor it was the Communists, not the Church, who had sided with the poor.

Concern 3) Misinterpretation of Sacramentality: Instruction 1 gave a blunt critique of the relationship between liberation theology and the sacraments. “Sacramentality, which is at the root of the ecclesial ministries and which makes of the Church a spiritual reality which

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10 “The Christians for socialism, to put it simply, are not fighting against the Church or against the bishops, but against a system of domination which engenders underdevelopment and extreme poverty. Confrontations take place in the measure that this Church or Christians are tied to the system of domination.” (Pablo Richard, “Iglesias Popular: A Church Born of the People’s Struggles,” in The Church at the Crossroads, 118).

11 Gutiérrez does not specifically say that his faith in socialism was wrong but I suggest that he hints at any threat to the Christian message needing to be examined in the “Revised Introduction” in A Theology of Liberation. “At every stage, therefore, we must refine, improve, and possibly correct earlier formulations if we want to use language that is understandable and faithful both to the integral Christian message and to the reality we experience.” xviii. Gutiérrez also acknowledged that a key analytical tool of Marxist analysis, namely the “dependency theory” was inadequate. “It is clear, for example, that the theory of dependence, which was so extensively used in the early years of our encounter with the Latin American world, is now an inadequate tool. (A Theology of Liberation, xxii).
cannot be reduced to a purely sociological analysis is quite simply ignored.”

In relation to the Eucharist the document states: “The Eucharist becomes a celebration of the people in their struggle. As a consequence the unity of the Church is radically denied.”

Response: Gutiérrez described the Church as the sacrament of salvation but this is an integral salvation as the “work” of salvation takes place in history:

The place of the mission of the Church is where the celebration of the Lord’s Supper and the creation of human fellowship are indissolubly joined. This is what it means in an active and concrete way to be the sacrament of the salvation of the world. The Eucharistic rite in its essential elements is communitarian and oriented toward the constitution of human fellowship.

If liberation theology was leading to divisions within a worshipping community then a question arises as to whether this division is damaging or the necessary result of a prophetic call to change. Prophetic change calls people to move from their comfortable position to a more faithful commitment to the Lord, not division. Jesus portrayed this call to move throughout the Gospel with His own radical form of table fellowship. Yves Congar described the liturgy as an “exceptionally authoritative norm” intimating that its power to form and transform the faithful cannot be underestimated. Writing in the 1960s, Congar raised questions regarding Eucharistic efficacy: “Too many things have become rituals for us, things that exist in themselves, ready-made. We are pre-occupied to carry out the

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12 Instruction 1, # 49.
13 Instruction 1, # 51.
14 Gutiérrez, A Theology of Liberation. 148-149.
15 Accusations of gluttony and drunkenness and befriending tax collectors and sinners (Matt. 11:19; Luke 7: 18-35) are related to the breaking of religious and cultural norms regarding the sharing of meals (Luke 7: 36-50). In His table fellowship, Jesus displays an inclusivity that affords those gathered the invitation for transformation. An encounter with Jesus results in the transformation of Zaccheus (Luke 19: 1-10). The concrete response to this encounter is for Zaccheus to pay back more than he had pilfered.
16 Yves Congar, True and False Reform, 291.
ceremony, meet the conditions for validity, but without being concerned whether these rituals are the actions of living persons.”

Gutiérrez and his fellow liberation theologians were concerned that the Catholic liturgies, and more specifically the Eucharist, were void of any reference/relationship to the poor or to the realities of their life. They believed that when separated from the everyday terrain of life, the Eucharist could become a ritual that represented a form of escapism, or worse still, fatalism. They not only wanted the Eucharist to be a communication of God’s love for the poor, they wanted the Eucharist to highlight the inequality in the Church and world. This was an inequality that was in direct contrast to the very unity that the Eucharist represents. Gutiérrez argued that sacramental practice should be bringing the community closer together and should in fact highlight the “brokenness” evident in our world.

Concern 4) Violence: In Instruction 1 the concerns raised in the area of violence are also related to the Marxist influence on liberation theology. Marxism views social revolution with the potential use of force as a necessary and acceptable process. The document states: “For the Marxist the truth is the truth of class: there is no truth but the truth in the struggle of the revolutionary class. The fundamental law of history, which is the law of the class struggle, implies that society is founded on violence.” The Church’s concern was that the advocacy of violence was contrary to the Gospel and that the utilisation of Marxist analysis raised the potential for violence.

Response: The Medellín document on “Peace” states that justice is a prerequisite of peace and that the institutionalised injustice perpetrated on the people of Latin America was inciting violence. “We should not be surprised therefore, that the “temptation to violence”

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17 Ibid., 46.
18 Instruction 1, # 38.
is surfacing in Latin America. One should not abuse the patience of a people that for years has born a situation that would not be acceptable to anyone with any degree of awareness of human rights.”

Gutiérrez argued that those who were the victims of institutionalised and structural violence had a legitimate claim to liberate themselves but what this liberation entails in relation to the use of violence is not elaborated upon. Gutiérrez seems to defend the potential use of violence from a religious perspective arguing that the rejection of peace is a rejection of the Lord himself.

While *Instruction 1* did not explore the difference between unjust and just violence it raised a valid question in relation to the use of violence. To this end I do not believe that Gutiérrez has effectively addressed their concern. Although it is not made explicit, I would surmise that the Magisterium was concerned that the liberationist understanding of the preferential option for the poor could lead to violent revolution. In the case of Saint Oscar Romero and indeed many other Church martyrs it did lead to violence, but that violence was perpetrated by governments and military personnel whose anti-Marxist position found support in conservative elements of the Catholic Church? Though the Church did not condone the methods of the oppressors in Latin America, and its concerns regarding the potential of violence in liberation theology is valid, it remained incapable of self-interrogation. The Church’s opposition to Saint Oscar Romero is a tragic irony inasmuch as this opposition rested comfortably with those who had some responsibility in his murder. The only

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19 Medellín Document on Peace, # 16.  
21 See pages 63-66.
conclusion I can reach is that while the Magisterium accepts the teaching on the preferential option for the poor, it did not accept the way that Romero practiced it.

The Magisterium’s position on revolution and violence is complex. In relation to the injustice perpetrated upon the poor, Pope Paul VI wrote: “Continuing avarice on their part will arouse the judgement of God and the wrath of the poor, with consequences no-one can foresee.”22 Neither Pope Paul VI nor Gutiérrez promoted violence but when tackling the issue of injustice they seem to recognise that it remains a last resort. What is absent from the liberation theology writings and the Instruction is any reference to pacifism and more specific to this thesis any connection between pacifism and a preferential option for the poor. In Chapter Four, I will present Dorothy Day as a model of living the preferential option for the poor and one of her unique contributions to the teaching was her pacifism.

**Concern 5) Political Reading of Scripture: **Instruction 1 accused liberation theologians of reducing biblical interpretation to a political reading. It claimed that although the book of Exodus highlights a political liberation from foreign oppression, it is not primarily political. “The Jewish people lived in the hope of a new liberation and beyond that awaited a definitive liberation. In this experience, God is recognized as the liberator. He will enter into a new covenant with His people. It will be marked by the gift of His spirit and the conversion of hearts.”23 This conversion of hearts is the basis for liberating change in the New Testament and leads to a greater level of justice toward our brothers and sisters:

> Faith in the Incarnate Word, dead and risen for all men and whom ‘God made Lord and Christ’ is denied. In its place is substituted a figure of Jesus who is a ‘kind of symbol who sums up in Himself the requirement of the struggle of the oppressed.’ An exclusively political interpretation is thus

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22 Pope Paul VI, *Populorum Progressio*, # 49.
23 *Instruction* 1, # 18.
given to the death of Christ. In this way, its value for salvation and the whole economy of redemption is denied.\textsuperscript{24}

**Response:** Accusations of denying ‘faith in the Incarnate Word” is a misrepresentation of Gutiérrez’s work. Gutiérrez speaks of the Word that dwells amongst us, the Word that entered human history and made God’s presence known in history. It is in history that we encounter God. “Since the Incarnation, humanity, every human being, history, is the living temple of God.”\textsuperscript{25} In the parable of the Last Judgment (Matthew 25: 31-46) Christ is identified with the poor and neglected, and serving their needs is equated to an encounter with God.

The Incarnation will “scatter the proud hearted and raise up the lowly,” “fill the starving with good things and send the rich away empty” (Luke 1: 51-54). The Incarnation will “bring good news to the poor, liberty to captives and free the oppressed” (Luke 4 18-19). The “order” of the world is to be overturned. Gutiérrez is challenging the Church toward fidelity to the Word, rather than a politicisation of its message. The *Instruction* fails to grasp Gutiérrez’s concept of integrated liberation. For Gutiérrez the preferential option for the poor is a theological teaching that requires a spiritual transformation as well as political action, and this transformation is at both a personal and ecclesial level.

**Concern 6) Theologies of Liberation not Authenticated by the Magisterium of the Church:**

The Magisterium claims that the doctrinal frontiers of liberation theology are badly defined: “The meeting, then, of the aspiration for liberation and the theologies of liberation is not one of mere chance. The significance of this encounter between the two can be understood only in light of the specific message of revelation, authentically interpreted by the

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\textsuperscript{24} *Instruction* 1, # 19.

\textsuperscript{25} Gustavo Gutiérrez, *A Theology of Liberation*, 110.
Magisterium of the church. The Magisterium defends its commitment to social justice by pointing out the creation of the Pontifical Commission for Justice and Peace and the various documents it has produced in response to poverty, injustice and oppression.

The “base groups” (BECs) that are the “agents of their own change” are also criticised as lacking catechesis and theological formation: “All priests, religious and lay people who hear this call for justice and who want to work for evangelization and the advancement of mankind will do so in communion with their bishops and with the church, each in accord with his or her own specific ecclesial vocation.”

Response: For Gutiérrez the main focus of “confrontation” was with the oppressors, not the Magisterium. While the Magisterium is charged with the task of protecting the integrity of the Church’s teaching, this teaching is not an immovable object. Liberation theologians introduced new voices to the Church’s ongoing narrative and these voices were for the benefit of the whole Church. There were many people working in communion with Saint Oscar Romero. Were they lacking in “catechesis and theological formation?” This criticism was particularly weak given the incompetence and indifference of many Latin American bishops to understand and improve the situation of the poor. Did the “specific ecclesial vocation” of these bishops dismiss their responsibility for protecting the poor?

Concern 7) Understanding of Poverty: It is my contention, that Instruction 1 substantiates the preferential option for the poor as official Church teaching. Describing the teaching as the result of an “authentic evangelical spirit,” the document goes on to say: “In order to answer the challenges leveled at our time by oppression and hunger, the Church’s Magisterium has frequently expressed the desire to awaken Christian consciences to a sense

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26 Instruction 1, # 49.
27 Instruction 1, # 52.
of justice, social responsibility and solidarity with the poor and oppressed.” To this end, *Instruction 1* should have signified a landmark in relation to the Church’s renewed and developing understanding of poverty. Instead, it returned to a more traditional and inadequate position that pre-dated the contribution to the Church’s understanding of poverty presented at Medellin and evident in Gutiérrez’s writings.

**Response:** In its critique of liberation theology’s understanding of poverty *Instruction 1* returns to ethical formulas of material scarcity that predate the “irruption of the poor” and contribute nothing to the development of a theology of the poor. Gutiérrez’s threefold renewed understanding of poverty is ignored. The preferential option for the poor is a theological statement that goes well beyond personal appeals; it moves to the very heart of how the Church proclaims the Gospel. The profligacy of worldwide poverty suggested that the Church’s “personal awakening” policy required significant change.

**Further Comments from Rome**

While the 1986 *Instruction on Christian Freedom and Liberation* had been promised in the 1984 *Instruction*, I am going to assume that its content had not been finalised and that the SCDF was awaiting reactions to *Instruction 1*. One of the more sinister concerns that arose from the first *Instruction* was the safety of Church workers who had aligned themselves with liberation theology and were living the option for the poor. The violent history toward Church workers in El Salvador should have alerted the Roman authorities to be a little more circumspect in their criticism. There is a naiveté in *Instruction 1* because it provided anti-

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28 *Instruction 1*, # 24.
29 See pages 46-47.
liberationists with ammunition to oppress the theology and left the theology’s practitioners exposed.\textsuperscript{30}

It is clear that the attacks on the theology of liberation were softened in the second Instruction. There was an acknowledgement that liberation theology had a place in Church theology, but a reminder of the centrality of Church authority and the unacceptable use of Marxist analysis. For the sake of clarity I will highlight three key concerns evident in Instruction 2.

\textbf{Concern 1) The Role of the Magisterium:} Instruction 2 declared that the Church has a liberating mission: “The Church is firmly determined to respond to the anxiety of contemporary man as he endures oppression and yearns for freedom. The political and economic winning of society is not a direct part of her mission, but the Lord Jesus has entrusted to her the word of God which is capable of enlightening consciences.”\textsuperscript{31} The document argued that any response to poverty and oppression needs to be guided by the tradition and teaching of the Church. “Through the mystery of the incarnate Word and the Redeemer of the world, she possesses the truth regarding the Father and his love for us, and also the truth concerning man and his freedom.”\textsuperscript{32}

After a harsh assessment of BECs in Instruction 1, Instruction 2 describes them as a source of hope. It does however set certain parameters. These included the need to be faithful to the teachings of the Magisterium and to the hierarchal order of the Church, to listen to the Word of God and to engage in the sacramental life of the Church.

\textsuperscript{30} The history of Saint Oscar Romero and the complicity of some Church authorities with violent ant-communist regimes is evidence of this. See pages 63-66.
\textsuperscript{31} Instruction 2, # 59.
\textsuperscript{32} Instruction 2, # 10.
Response: Liberation theologians would have been pleased to read in the document that the Church had a liberating mission. There is however a rejection of the “integral liberation” proposed by Gutiérrez as the document states that political and economic liberation are not part of her mandate. The Church’s role is to “enlighten consciences” which is a personal call for commitment but lacks any broader plan for the wider Church. Church authority is promoted, but there is no acknowledgement of the failure of that authority to “hear the cry of the poor.” Liberation theology practised a method that began by listening to the poor and this method was instrumental in the formulation of the teaching of the preferential option for the poor. A question arises as to whether a Church authority such as the one proposed in Instruction 2 would have ever been capable of formulating the teaching and I believe the answer is no.

Concern 2) The Meaning of Freedom: Instruction 2 described the Gospel as a message of freedom and liberation: “The Church of Christ exercising discernment in the light of the gospel which is by its very nature a message of freedom and liberation.”\textsuperscript{33} It adds that freedom and liberation belong to the traditional patrimony of the Churches and ecclesial communities. We are called to be like Jesus and it is in the “imitation of Christ” that we discover true freedom.

Freedom is also described as an exercise that is other-oriented: “Freedom is not the liberty to do anything whatsoever, it is the freedom to do good, and in this alone is happiness to be found. The good is thus the goal of freedom.”\textsuperscript{34} In accord with natural law anthropology, human beings understand the self in relation to others and it is a just social order which recognises the dignity of each and every person that contributes to people’s freedom: “A

\textsuperscript{33} Instruction 2, # 7.
\textsuperscript{34} Instruction 2, # 28.
just social order offers man irreplaceable assistance in realising his free personality. On the other hand, an unjust social order is a threat and an obstacle which can compromise his destiny.”

**Response:** To hear the Gospel described as a message of freedom and liberation would also have pleased liberation theologians. To then describe that freedom in relation to a just social order and an unjust social order as a threat to freedom is also in accord with liberation theology. This key aspect of the document provides a framework from which concrete action can be determined.

**Concern 3) The Meaning of Liberation:** *Instruction 2* acknowledged that oppressive economic conditions had created a disturbing inequality: “New relationships of inequality and oppression have been established between the nations endowed with power and those without it. The pursuit of one’s own interest seems to be the rule of international relations, without the common good of humanity being taken into consideration.”

The document claimed that the social doctrine of the Church is oriented toward action and that some structures within society are marked by sin; it also recognized the possibility of opposing sinful structures: “It is therefore perfectly legitimate that those who suffer oppression on the part of the wealthy or the politically powerful should take action, through morally licit means in order to secure structures and institutions in which their rights will be respected.”

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35 *Instruction 2*, # 32.  
36 *Instruction 2*, # 19.  
37 *Instruction 2*, # 73.
Response: The recognition that there are “sinful structures” that contribute to global inequality and that the oppressed are within their rights to seek “morally licit” means to oppose those structures resonates with liberation theology.

Despite the more amicable approach to liberation theology in the second Instruction and an official recognition of the preferential option for the poor the document does not acknowledge or endorse Medellín or Liberation Theology. Dean Brackley explains:

The document warns that not only would it be grave error to reduce salvation to earthly liberation; they ought not to be identified in any way, for they do not belong to the same order. In its zeal to condemn the reduction of salvation to social and political liberation, the second instruction implies a reduction of salvation, strictly speaking, to the interior and personal (and ecclesial). To this extent, it backpedals from Medellín and EN.

While the two Instructions may have clarified the Magisterium’s position in relation to liberation theology, the Vatican had been dismantling the theology’s influence well before their publication. The initial success of liberation theology and the promotion of the preferential option for the poor were enhanced by hierarchical support. When the Vatican replaced bishops who were sympathetic to liberation theology with opponents of the theology, its influence and practise began to wane.

Evaluation of the Two Instructions

There are three further points I would like to posit which extend this summary and evaluation of the two Instructions. These three points are underpinned by the fact that the starting position for the Instructions was not the poor, but rather the Church hierarchy. This

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38 Instruction 2, # 64.
gave the documents their authoritative tone and in effect diminished their potential influence on the teaching of the preferential option on the poor.

**Point One: The documents recognize the importance of liberating the poor but there is no reference to there being a “poor perspective.”**

*Instruction 1* acknowledged that the gospel contained a message of freedom and liberation, but then states that it is the Magisterium that interprets this message. Both *Instructions* failed to recognize that new insights into freedom and liberation were being proffered by the poor and that their voice was providing the Church with new insights into freedom, liberation and evangelization. The “poor perspective” played a significant role in the formulation of the theologies of liberation, but had no voice in the two *Instructions*. There is simply no reference to the emergence of a theology of the poor.

**Point Two: There is a return to a more hierarchal teaching method but no scrutiny as to its effectiveness regarding poverty.**

Both *Instructions* call for obedience to the Magisterium but once again, the Magisterium is not speaking from the perspective of the poor. The Magisterium seems content with a process by which it pricks the conscience of the faithful to respond to the poor, but offers no reflection on the expediency of this approach. In short, liberation theologians claimed that this method was failing the poor and that the poor becoming agents of their own change, as well as the Church acting in solidarity with the poor, would be a more effective method.

**Point Three: The praxis component of evangelization is severely understated.**

Liberation theology provided a framework whereby learning precedes teaching; furthermore, this learning was dependent upon an existential experience, a living, listening and worshipping in the community in which one is immersed. In the two *Instructions*
teaching precedes learning, and the teacher is far more focussed on their own authority than they are on the voice of the poor.

Perhaps the greatest failure of the two Instructions was not their content but that they were presented as statements rather than questions. Both documents contained legitimate concerns that posed questions for liberation theologians. These concerns needed reflection and the way forward should have included dialogue. Maybe some discussions did take place but I can find no such evidence. The Vatican treatment of Saint Oscar Romero and the episcopal appointments in Latin America prior to the publication of the documents suggests that the Vatican had already determined its direction, and dialogue with liberation theologians was not part of its agenda.

The preceding examination of the Magisterium’s Instructions was presented in order to illustrate that the Church now recognised the preferential option for the poor as official teaching, but that the teaching was about to undergo a significant “renovation.” The condemnation of liberation theology left the teaching without its theological framework and the question would now move to how the Magisterium will understand and apply a teaching it acknowledged as orthodox. An investigation to answer this question begins with an examination of CST between 1980 and 1988.

**Catholic Social Teaching (1980-1988)**

Between 1980 and 1988 Pope John Paul II issued two social encyclicals. The first of these was *Laborem Exercens* (On Human Work). This 1981 encyclical marked the 90th anniversary of *Rerum Novarum* (RN) and focused on the importance of work for human flourishing. It
made no reference to the teaching on the preferential option for the poor, but was well received by liberation theologians for its respect and protection of the worker. The second encyclical was titled *Sollicitudo rei Socialis* (On Social Concern) and was published in 1987. It did make reference to the preferential option for the poor, but its major thrust was the development of solidarity as a virtue in CST.

**Laborem Excercens (On Human Work) (1981)**

*Laborem Excercens* (LE)\(^{40}\) described work as a personal and social activity, which affords the worker dignity and contributes to the common good. The encyclical states that work is for the person, not the person for work.\(^ {41}\) With labour having priority over capital, any economic system that views the worker as “merchandise” is condemned as sinful and against right moral order. Rather than a preferential option for the poor, the document could be described as a preferential option for the worker, but given the poverty among those who work in various continents around the world, it did seek to protect their interests. It was for this reason that it made a small contribution to the teaching on the preferential option for the poor.

LE regards work as integral to human flourishing. The Church’s role is to promote a concept of work that is in keeping with principles of social justice and provides the worker with a sense of dignity.

In order to achieve social justice in the various parts of the world, in the various countries and in the relationships between them, there is a need for


\(^{41}\) LE, # 6.
ever new movements of solidarity of the workers and with the workers. The church is firmly committed to this cause for she considers it her mission, her service, a proof of her fidelity to Christ, so that she can truly be the “church of the poor.” And the ‘poor’ appear under various forms as a result of the violation of the dignity of human work.42

In the document the subject (the worker) is primary and the object (the work) is secondary. Work is understood as both a personal and social activity because when people experience dignity through work (personal) it builds the human community (social). The encyclical continues the CST tradition of condemning the “unabashed competitiveness of liberal capitalism and the collectivism of Marxism,43 because neither system views the dignity of the person as primary.

The encyclical also promotes a spirituality of work which adjudges humanity as co-creators with God: “The enduring legacy and challenge of this encyclical is its positive vision of human labour as a sharing in the activity of the Creator, and the responsibility of men and women to collaborate in the ongoing creation and re-creation of both self and the world of work.”44

Despite the fact that the encyclical does not mention the preferential option for the poor it was well received in Latin America because it challenged the economic structures that violated workers’ rights:

The encyclical was praised for several elements that resonated with a theology of liberation: the inductive methodology from the situation and praxis of work and the workers; the spirituality of work; the call for a “church of the poor”; and its “liberating theology.” That is, the liberation of

42 LE, # 8.
43 LE, # 11.
44 Patricia A. Lamoureux, “Commentary on Laborem Exercens (On Human Work),” in Modern Catholic Social Teaching, 389.
the poor, the priority of the worker over capital, and solidarity with the workers.\textsuperscript{45}

While there is encouragement for the working poor in the document, there are two elements that limit its capacity to expand the teaching on the preferential option for the poor. The first is practical: there is not enough emphasis on social sin and sinful structures. Opposing sinful structures was an important component of liberation theology and a sign of solidarity and protest with the poor. While there is a definitive promotion of the rights of workers through the trade union movement, there is little said about the impact of political and economic systems that perpetuate unjust poverty and injustice.

The second element is methodological. In \textit{Gaudium et Spes} (1965) and \textit{Octogesimo Adveniens} (1971), CST focussed on local Churches discerning the “signs of the times” and acting in accordance with their reflections. LE represents a universal vision posited by the Vatican rather than local reflection. This authoritative and centralised approach would become a hallmark of Pope John Paul II's social teaching and was in stark contrast to the grass roots approach of liberation theology. The methodology adopted by Pope John Paul II was, I believe, detrimental to the understanding and application of the preferential option for the poor because the primary source for reflection was the Vatican, rather than the existential reality of the poor.

\textbf{Sollicitudo rei Socialis (On Social Concern) (1987)}

\textit{Sollicitudo rei Socialis} (SRS)\textsuperscript{46} laments the multitudes of people living in poverty and the widening economic gap at both an international and local level. Pope John Paul II argued

\footnotesize{\textsuperscript{45} Ibid., 409.}
that the answer to this growing division is solidarity. A commitment to justice, the preferential option for the poor and the elimination of sinful structures would be achieved by personal conversion and solidarity between peoples.

**Solidarity:** Pope John Paul II’s decision to define solidarity as a virtue was a new initiative in CST. “One of the underdeveloped aspects of CST is the role of the virtues. It is refreshing to see John Paul give such prominence to the virtue of solidarity. This virtue complements those of justice and the common good. Solidarity is, in fact, closely linked with the themes of justice and the common good.”\(^\text{47}\) The document argued that Christians should regard interdependence as a moral reality and solidarity between people as a virtue.\(^\text{48}\) In biblical and theological terminology, the virtue of solidarity directs people toward concern for their neighbour. When people seek to practice the virtue of solidarity they are unlikely to regard one another as instruments to be exploited:

> When interdependence becomes recognized as a moral category, the response as a moral and social attitude, as a “virtue,” is solidarity. Solidarity is not a feeling of vague distress at the misfortunes of people. On the contrary, solidarity is the firm and persevering determination to commit oneself to the common good, that is to say the good of all. We are responsible for all. Solidarity is based on the conviction that desire for profit and thirst for power hinder full development.\(^\text{49}\)

The preferential option for the poor is described in SRS as vital in bridging the chasm between the rich and poor, and as an option for the whole Church.

The option or love of preference for the poor is an option, or a special form of primacy in the exercise of Christian charity, to which the whole tradition

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\(^{46}\) Pope John Paul II, *Sollicitudo rei Socialis*, Encyclical Letter (Homebush NSW: St Paul Publications, 1988). (Hereafter this document will be cited as SRS)

\(^{47}\) Charles Curran, Kenneth Himes, Thomas Shannon, “Commentary on Sollicitudo rei socialis (On Social Concern),” in *Modern Catholic Social Teaching*, 430.

\(^{48}\) SRS, # 38-9.

must bear witness. It affects the life of each Christian inasmuch as he or she seeks to imitate the life of Christ, but it applies equally to our social responsibilities and hence to our manner of living. This love of preference for the poor, cannot but embrace the immense multitudes of the hungry, the needy, the homeless, those without medical care and, above all, those without hope for a better future.\(^5^0\)

According to SRS, the major obstacle to authentic human development and liberation is personal sin, which when multiplied results in sinful structures:

After the stinging evaluation, the encyclical nonetheless, leaves the structural realm and immediately turns to what it calls the moral dimensions of the obstacles, namely sin (36-7), which can be transformed through conversion (38), and the moral virtue of solidarity (39). Even though “structures of sin” are addressed, SRS recalls that all sin is rooted in “the concrete acts of individuals, who introduce these structures, consolidate them and make them difficult to remove” (36). The encyclical urges conversion to solidarity among persons who feel personally affected by the injustices inflicted on others (38). Structural and political obstacles apparently are overcome by personal changes of heart.\(^5^1\)

While not denying a correlation between personal and structural sin, what SRS fails to investigate is that societal structures have a formative function and if they are unjust there is a consequential impact. A society that is firmly founded on just structures affords all its citizens with a suitable environment in which they can become more just. These structures cannot guarantee that people will become just but they provide a suitable formation framework. In Christian terminology, people will always require ongoing conversion and liberation from sin, but a just society contains an inherent potential to form just people. Unjust structures contain an inherent potential to do the opposite.

The Exodus story is one of liberation from oppression. The covenantal people will require liberation from sinfulness throughout their journey but the journey began with liberation

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\(^{50}\) SRS, # 42.

from political oppression. The dismantling of apartheid required new societal structures and if the process was dependent upon an authentic conversion of the powerful white minority, the system could still be in place. If Australia waited for its entire population to overcome racism and/or ignorance before allowing the first nations people to vote, the unjust structures may still be in place. The document fails to grasp the potential that sinful structures have in blocking the conversion process.

Societal structures that oppress can surreptitiously create oppressors despite people living seemingly moral lives. Alternatively just structures can assist in the creation of new ways of thinking and acting. In *Instruction* 2, the benefits of a just social order are extolled.\(^{52}\) The Catholic Church has a long tradition in the area of formation and should have been aware of its potential benefits. Personal conversion is important in all types of society but the structures in which we live and grow are formative. The Church is itself a structure that plays an integral role in the formation of the faithful; these structures have, by the Church’s own admission sometimes failed and require constant scrutiny:

> By the power of the Holy Spirit the Church will remain the faithful spouse of her Lord and will never cease to be the sign of salvation on earth, still she is very well aware that among her members, both clerical and lay, some have been unfaithful to the Spirit of God during the course of many centuries; in the present age, too, it does not escape the Church how great a distance lies between the message she offers and the human failings of those to whom the Gospel is entrusted.\(^{53}\)

In SRS local churches do not determine norms of judgement and pastoral plans of action relevant to their situation. Church teaching is centralised and the call is for personal conversion. Despite SRS promoting the teaching on the preferential option for the poor, it

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\(^{52}\) *Instruction* 2, # 32.

\(^{53}\) Vatican II, *Gaudium et Spes*, # 43.
adds little to the teaching’s dissemination because it fails to look at structures, including its own. It also fails to understand or accept that the teaching’s revolutionary methodology allowed for the poor to be the starting point. In SRS the poor are not considered “agents of their own change” and the preferential option for the poor is directed toward an individual ethical choice that people are challenged to make in accordance with Church documents.

Part II: The Evolving Liberation Theology of Gustavo Gutiérrez

The historical context in Latin America remained volatile throughout the 1980s. Liberation theologians found themselves under attack from the Vatican, conservative sectors of the Latin American Church, and powerful sections of the United States government and media. Despite the antagonism toward liberation theology, Gutiérrez continued to practise, reflect and expand upon his theology and its contribution to the teaching on the preferential option for the poor. The following are texts published by Gutiérrez from 1980-1988.

We drink from our own wells

Prior to the publication of Instruction 1, Gutiérrez published the Spanish edition of We drink from our own wells. The English version was published in 1984. This book offered a more comprehensive explanation of liberation theology’s spirituality. Gutiérrez’ theological method had highlighted the contextual relevance of existential formation rather than

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54 In 1988 the Wall Street Journal and the New York Times warned of the danger of a communist takeover in Mexico. “The Latin American political process of the last twenty years has been injected with the harmful influence of the so-called theology of liberation which proposed to install Communism in the name of Christianity, and which has been the seedbed of more terrorists in the region than any other outright Marxist parties.” Arthur McGovern, Liberation Theology and its Critics, (Maryknoll NY: Orbis Books, 1988), 13.

adherence to universal principles, but he acknowledged that authentic theology required an encounter with the Lord. He argued that solidarity with the poor was in fact, a genuine encounter with the Lord.

In *We drink from our own wells*, Gutiérrez posits a theory that traditional approaches to spirituality had limited the criteria for encounter with the Lord. The consequence of this limitation incapacitated the Church to understand the theological and spiritual implications of the preferential option for the poor. For example, a spirituality that encouraged separation from the world and an individual journey toward holiness could be undertaken void of any reference to the presence or preference of others. This avoidance of the historical and social nature of faith was a dangerous privatisation of spirituality that distorted the following of Jesus. In the book, Gutiérrez argues that it is in responding to the needs of the poor that we encounter the Lord. In reference to Matthew 25: 31-46 he writes:

> Matthew’s parable reminds us that what we do to the poor we do to Christ himself. It is this fact that gives action on behalf of the poor its decisive character and prevents it from being taken simply as an expression of the social dimension of faith. No. It is much more than that; such action has an element of contemplation, of encounter with God, at the very heart of the work of love.⁵⁶

For the major contributors to the formulation of the preferential option for the poor the teaching was not just an individual choice; it was a teaching that required the whole Church to take up and concretely practise this preferential option:

> The spirituality being born in Latin America is the spirituality of the church of the poor, to which Pope John XXIII called all of us, the spirituality of an ecclesial community that is trying to make effective its solidarity with the poorest of this world. It is a collective, ecclesial spirituality that without losing anything of its universal perspective is stamped with the religious

⁵⁶ Gutiérrez, *We drink from our own wells*, 104.
outlook of an exploited and believing people. The journey is one undertaken by the entire people of God.  

Gutiérrez argues that a spirituality that separates us from the world separates us from the poor. As a consequence the poor become alienated from the Church. When the Church makes a preferential option for the poor it invites the “alienated” to take their proper place and the Church is enriched. “Those who involve themselves in this struggle likewise become strangers to Latin American society and even to some sections of the Church. They are in fact alienated from the status quo and its beneficiaries, who regard themselves as the owners of lands, goods and persons.”

To be liberated from poverty and oppression does not equate to being liberated from sin, but the denunciation of sinful situations precedes an annunciation of a more just society. Gutiérrez was not attempting to usurp the importance of the individual spiritual journey, but in We drink from our own wells, he seeks to broaden our capacity to encounter the Lord, overcome the spiritual/historical dichotomy, and lead the Church toward practising the preferential option for the poor as being central to its mission, rather than an individual choice.

Expanding the View

On the 15th anniversary of the publication of A Theology of Liberation, Gutiérrez republished the book and although the body of the text remained unchanged there was a new introduction titled Expanding the View. The new addition acknowledges the tensions that had arisen between the Church hierarchy and liberation theologians. It is however, written

\[57\] Ibid., 29.
\[58\] Ibid., 11.
in a conciliatory tone and expresses his desire to be faithful to the Church and to be in
dialogue with, rather than in opposition to Rome:

It has meant some painful moments at the personal level, usually for
reasons that will pass away. The important thing, however, is that the
debate has been an enriching spiritual experience. It has also been an
opportunity to renew in depth our fidelity to the church in which all of us as
a community believe and hope in the Lord, as well as to reassert our
solidarity with the poor, those privileged members of the reign of God.\textsuperscript{59}

The new introduction admitted to errors that time had undermined, with specific reference
to the theory of dependence\textsuperscript{60} which is described as an “inadequate tool.”\textsuperscript{61} The
recognition of the inadequacy of dependency theory was a significant shift in the thinking of
Gutiérrez. Liberation theologian Ivan Petrella explains:

Liberation theology emerged at a time when dependency theory controlled
the imagination of Latin American intellectuals. Indeed, the importance of
dependency theory for liberation theology’s understanding of society and
the economy is impossible to overestimate. Dependency theory provided
the framework within which Latin American reality was analysed, the
picture of the enemy to be fought in pursuit of liberation and the choice of
weapons by which to fight best.\textsuperscript{62}

In response to Instruction 1 which had accused the theology of liberation of denying the
primacy of liberation from sin, Gutiérrez writes:

Finally there is liberation from sin, which attacks the deepest root of all
servitude; for sin is the breaking of friendship with God and with other
human beings, and therefore cannot be eradicated except by the unmerited
redemptive love of the Lord whom we receive by faith and in communion
with one another. Liberation from sin gets to the very source of social

\textsuperscript{59} Gustavo Gutiérrez, \textit{A Theology of Liberation}, xviii.
\textsuperscript{60} Dependency theory was an argument based upon the belief that in Latin America capitalism was keeping
people in a state of underdevelopment while the rich both inside and outside the continent maintained their
wealth. Dependency theory showed that capitalism was the enemy and socialism was the answer.
\textsuperscript{61} Ibid., xxiv.
injustice and other forms of human oppression and reconciles us with God and our fellow human beings.63

Gutiérrez had proposed a method of doing theology that required participation at three levels. The first of these was the viewpoint of the poor and in the theological history of the Church they were a new presence. The second component of his method was reflection; that is reflection on the experiences of sharing faith and life with the poor. The final component was the proclamation of the kingdom of life and actions that contribute to building that kingdom.

The Viewpoint of the Poor (A New Presence): The Catholic Church’s history is replete with women, men and organisations who have served the poor but Gutiérrez wanted to investigate how the poor lived their faith and how they experienced God in their midst. He wanted their faith experience to influence the Church because their “absence” impoverished the Church. “Our time bears the imprint of the new presence of those who in fact used to be “absent” from our society and the church. By “absent” I mean of little or no importance, and without the opportunity to give expression themselves to their sufferings, their comraderies, their plan, their hopes.”64

The preferential option for the poor is not due to the moral superiority of the poor, but because God’s universal and gratuitous love for all judges that the last shall be first and the first shall be last. Gutiérrez insisted that the great challenge was to maintain both the universality of God’s love and God’s predilection for the poor. The preferential option for the poor is first and foremost an act of fidelity to God and as such to be undertaken, not only by individual persons but by the whole Church.

63 Ibid., xxxviii.
64 Gutiérrez, A Theology of Liberation, xx.
The ultimate reason for commitment to the poor and oppressed is not to be found in the social analysis we use, or in human compassion, or in any direct experience we ourselves may have of poverty. These are all doubtless valid motives that play an important part in our commitment. As Christians, however, our commitment is grounded, in the final analysis, in the God of our faith. It is a theocentric, prophetic option that has its roots in the unmerited love of God and is demanded by this love.65

**Theological Reflection:** For Gutiérrez, theological reflection is neither the first nor final act. His theological method is dialectical. It begins with experience, moves to reflection and then to action. Actions create new experiences, further reflections and new actions. The entire process operates within the light of the Gospel and includes the commitment of the theologian. Theologian Francisco Moreno Rejon explains:

> It is no exaggeration to state that both in execution and in its methodology it is the “most moral” of all the theologies. After all, on one hand it requires the theologian to make a commitment to do their reflecting from the locus of their actual Christian life, at the same time, its methodology posits praxis as the point of departure and arrival of the hermeneutic circle.66

Gutiérrez linked orthodoxy with orthopraxis speaking of the fruitful links between the two. The “orthodoxy” of liberation theology is that its primary task is the proclamation of the risen Jesus, and its “orthopraxis” is that this task is proclaimed in a situation of poverty and oppression. This is a fruitful link that the two *Instructions* and the subsequent documents of Pope John Paul II failed to understand, as their praxis position was not the poor but their own articulation of Church teaching. This failure contributed to their limited understanding and application of the preferential option for the poor.

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65 Ibid., xxvii.
While defending the position he had presented in *A Theology of Liberation*, Gutiérrez heeded concerns regarding the politicisation of the Gospel and his theology’s connection with the Church.

Since liberation theology is a critical reflection on the word of God received in the church, it will make explicit the values of faith, hope, and love that inspire the praxis of Christians. But it will also have to help in correcting possible deviations on the part of those who reject the demands of participation in history and the promotion of justice that follow from faith in the God of life, and also on the part of those who run the risk of forgetting central aspects of Christian life, because they are caught up in the demands of immediate political activity.67

**Proclaiming the Kingdom of Life**: Rather than portraying itself as some form of “defence attorney” for the poor, liberation theology believed in the poor’s’ evangelizing power. Gutiérrez stated that the Church needed to be a sign of the kingdom within human history and that the poor themselves were well placed to be that sign and herein lies a crucial aspect of a preferential option for the poor; that the poor themselves are proclaimers of the kingdom of life.

A proper involvement in the world of the poor by no means detracts from the church’s mission; rather in such involvement the church finds its full identity as a sign of the reign of God to which all human beings are called but in which the lowly and ‘unimportant’ have a privileged place. Solidarity with the poor does not weaken the church’s identity but strengthens it.68

Pope John Paul II had stated that liberation theology was not only timely, but useful and necessary,69 but that it needed to be expressed within the apostolic tradition and the church’s social teaching. Gutiérrez replied by accepting this challenge but argued that the

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67 Ibid., xxxiii
68 Ibid., xlii
69 In a speech to the Brazilian bishops in 1986 Pope John Paul II said: “We are convinced, we and you, that liberation theology is not only timely, but useful and necessary.” Cited in Liberation Theology: A Documented History, ed. Alfred Hennelly (Maryknoll NY: Orbis Books, 1990), 503.
method and historical consciousness of liberation theology illuminated a “historical lack” in the Church’s historical response to the poor and therefore it was the Church that needed to make a radical shift.

Liberation theology is in fact a ‘new stage’ and, as such, in my understanding of it, does indeed seek to be ‘closely connected’ with the church’s teaching. In my opinion, its power and importance are due to a freshness or newness that derives from attention to the historical vicissitudes of our peoples, for these are authentic signs of the times through which the Lord continually speaks to us. At the same time, its power and importance are due to the continuity that leads it to sink its roots deep in scripture, tradition and the magisterium.\footnote{Gutiérrez, \textit{A Theology of Liberation}, xlv}

In Part 1 of this chapter, I spoke of the systematic detachment of the preferential option for the poor from its roots in liberation theology but Gutiérrez did not necessarily share my opinion:

The major achievement of the Latin American church from 1968 to 1988 was that it renewed with unwonted energy its mission of evangelization and, ultimately, of liberation. It is in this context that we must understand what the preferential option for the poor means. As a result, throughout Latin America and on the international stage, the church has acquired a presence it never had before. Various factors have played a part in producing this result (which is in fact an ongoing process); one of them is liberation theology, which has in large measure articulated the way in which the Latin American Christian community proclaims its message.\footnote{Ibid., xxxvii.}

This abovementioned quote was published in 1988 and contained optimism in relation to the position of liberation theology and its influence on the teaching of the preferential option for the poor. My view, thirty years later, is more pessimistic. I would however argue that the treatment of the then Archbishop Oscar Romero and the deliberate policy to appoint anti-liberation theology bishops in Latin American from the late 1970s was evidence
of a Church hierarchy implementing a program to detach the preferential option for the poor from its theological origins well before 1988.\(^\text{72}\)

Gustavo Gutiérrez and Pope John Paul II operated from different methodological frameworks and these differences had a significant impact on how the teaching on the preferential option for the poor would be understood and applied. For Gutiérrez the teaching was formulated via a method that was theological, communal and practised in grass roots movements. The locus of teaching and place of formation was not in the hierarchy but in the community. Their faith-based discussions were centred on the experience of the community, collaborating with Church teaching and then constructing a more just social order from that particular perspective. Pope John Paul IIs framework tended to be ethical and hierarchical. The authority and teaching of the Church was primary, but the conclusions of this authority and teaching had been formed without the insights of the poor. What Gutiérrez and other liberation theologians were pointing out was the limitations in the teaching of this authority. They were not seeking to replace the authority but they were looking to expand the teaching.

The accusations contained within the two *Instructions* regarding the theology of liberation downgrading transcendence and politicising the faith are wrong in relation to Gutiérrez. He articulated a synthesis of activity and contemplation, and contends that action without contemplation is empty and destructive, while contemplation without action is avoidance and theorising. In *We drink from our own wells* he writes: “It is surprising to see a people becoming increasingly organized and more effective in the struggle to assert its right to life

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and justice, and at the same time giving evidence of a profound sense of prayer and of conviction that in the final analysis love and peace are an unexpected gift from God.”

What Gutiérrez did emphasise is that a faith bereft of liberating action in an environment of poverty and oppression bears little witness to the Gospel and that this witness requires more than increased charity.

A crucial requirement of both Medellín and liberation theology was that in order for the Church to be a Church of the poor it needed to separate itself from the power wielded by the political and economic elites in Latin America. Underpinning this action was recognition that the Church hierarchy had, in a majority of Latin American countries, been associated with these same elites. It was ironic that Gutiérrez and many other Church workers were accused of politicising the faith, when in order to enjoy freedom and favour, the Church hierarchy had been aligned with political and economic power. The further reality of the Church associating itself with USA foreign policy in Latin America to stop the spread of communism is evidence of its political involvement.

Pope John Paul II expressed great concern at the prevailing injustice and economic divide in the world but the two Instructions issued during his papacy insisted that the hierarchal Church must be the guiding force in relation to any Church response. Liberation theology promoted an inclusive form of response to injustice that started from the perspective of the poor, not the perspective of the Church.

In the social teaching of the Church, the subject or agent of the teaching of the faith is the magisterium. In liberation theology the subject developing the reflection (which cannot be properly called a teaching or doctrine), is the theologian who works within the liberation process of the Christian people,

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73 Gustavo Gutierrez, *We drink from our own wells*, 111.
74 See pages 63-64.
and who places his or her work at the service of the apostolic commitment
to the people of God, in conformity with the orientation given by the pope.
The theological task is a partnership with the traditional service rendered by
the magisterium.75

The Preferential Option for the Poor: An Uncertain Position

Despite liberation theology’s connection to CST, its association with Marxist-socialism was always going to be a point of contention. *Instruction on Certain Aspects of the Theology of Liberation* stated with great clarity the position of the Magisterium. Despite this important difference liberation theologians and the Magisterium should have been in dialogue, seeking more appropriate methods for their historical projects. The Church hierarchy’s policy was detachment, not dialogue and this policy was to the detriment of the teaching of the preferential option for the poor.

Political ideology was not the only conflict between liberation theology and the Church hierarchy. Liberation theology was first and foremost a new way of doing theology. It was inductive rather than deductive and it created the “space” for the “people of God” to be interlocutors in the formulation of theology and its pastoral implications. This was a theology of praxis and its locus and formation provided an alternative to the more authoritarian theological and ecclesial model evident in Catholic history.

During the papacy of John XXIII, a renewal in biblical scholarship played a significant role in the Church’s social doctrine. Contemporary biblical scholarship argued strongly that the option for the poor was the option taken by Jesus. There were some scholars who felt that under Pope John Paul II this biblical influence on social doctrine had halted and this was

75 Ricardo Antoncich, “Liberation Theology and the Social Teaching of the Church,” in *Mysterium Liberationis*, 104.
another sign of one of the important contributors to the formulation of the preferential option for the poor being curtailed. A former member of the Vatican Theological Commission, Professor Francis Moloney said: “there is every indication that the golden era of biblical enthusiasm in the Catholic Church is on the wane. There is a return to a new dogmatism.” In his commentary on *The Bible and Catholic Social Teaching*, Jesuit scholar John R. Donahue says: “This new dogmatism is shown in the tendency to prefer the *Catechism of the Catholic Church* over biblical teaching and to ground theology and ethics almost exclusively in magisterial statements.” The lessening of biblical scholarship and the emphasis on Church authority does not necessarily undermine the understanding and application of the teaching on the preferential option for the poor, but it was another indication of the changing environment in which the teaching would be operating.

**Summary and Transition**

The teaching on the preferential option for the poor has its most significant contributor and advocate in liberation theology. It is my argument that despite the influence of Vatican II, without Medellín and liberation theology the Vatican would have been incapable of formulating such a teaching. Accepting this premise leads to the question of whether the Vatican is adept to effectively disseminate the teaching throughout the universal Catholic Church? Alternatively, the teachings incorporation into CST provided it with a broader opportunity for universal credibility and practise.

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77 John R. Donahue, “The Bible and Catholic Social Teaching,” in *Modern Catholic Social Teaching*, 32.
The 1984 *Instruction on Certain Aspects of the Theology of Liberation* incorporated the teaching of the preferential option for the poor into the social doctrine of the Church but up until 1984 it was only liberation theology that had articulated criteria in which this teaching could be understood and applied. Vatican II encouraged biblical renewal, collegiality (Medellin being an example), as well as local and lay involvement in ecclesial formation and practise. Theologically and pastorally the Church began emphasising the historical importance of building the “Kingdom of God,” defined the Church as the “People of God” and encouraged BECs. These are but some of the variables that contributed to a model of Church that would assist in the formulation and development of the preferential option for the poor. It would be hubris to suggest that these are the only ways of promoting the preferential option for the poor and that the vicissitudes of history would not demand adaptations and new ideas, but they did have a pedagogy that provided formation for those who took the option.

The introduction to this thesis stated that one did not need to be a liberation theologian to practise a preferential option for the poor, but I would qualify that statement by declaring that by 1988 it was only liberation theology that had provided a framework for an understanding and application of the teaching. Throughout his papacy, John Paul II consistently defended the world’s poor, but the question for this thesis is how the Pope understood and applied the more specific teaching of the preferential option for the poor. What criteria would he offer for the continuing dissemination of the teaching throughout the universal Church? During the papacy of John Paul II the Vatican orchestrated a divorce process between liberation theology and the preferential option for the poor and in doing so
left the teaching theologically orphaned and now under the care and direction of the Vatican hierarchy.

The following chapter will evaluate whether the Vatican made any endeavour to deepen the Church’s understanding and application of the teaching on the preferential option for the poor. It will summarise and analyse the social encyclicals and documents related to the teaching issued between 1988 and 2012. The chapter will also include developments within liberation theology. These developments continued to provide further insights into the teaching on the preferential option for the poor. It will be my argument that the Vatican’s continued hostility to liberation theology negatively impacted its promotion of the preferential option for the poor and that during this historical era the teaching moved from uncertainty to stagnation.
Chapter Three
The Preferential Option for the Poor (1988-2013): From Uncertainty to Stagnation

The previous chapter concluded with an assessment that by 1988 the teaching of the preferential option for the poor was in an uncertain position. This claim was based on my argument, that, despite the teaching’s incorporation into the lexicon of Catholic Social Teaching, it had become detached from its theological origins. This detachment was orchestrated by Church authorities. In this chapter I will provide a synopsis which argues that Church authorities have failed to promote effectively the preferential option for the poor and as a result the teaching moved from uncertainty to stagnation.

Among the arguments I will present to support this claim is that under the leadership of both Pope John Paul II and Pope Benedict XVI, the teaching on the preferential option for the poor was presented within a framework that was hierarchal, centralised and largely influenced by a personalist ethic. This was in stark contrast to the initial formulation of the teaching which was dependent upon theological, communal, and praxis elements, and envisaged a broader collective mission that was to be at the very heart of the Church’s identity and mission.

The chapter will be presented in two parts. The first part will examine three documents published by Pope John Paul II, beginning with the 1991 document Centesimus Annus.¹ This document contained a number of foundational directions that the Pope would take in

relation to his social doctrine. The two later documents, *Tertio Millennio Adveniente*\(^2\) and *Evangelium Vitae*\(^3\) will be briefly referenced but only in relation to their contribution to the teaching on the preferential option for the poor. This will be followed by two documents published by Pope Benedict XVI, *Deus Caritas Est*\(^4\) and *Caritas in Veritate*.\(^5\) It is important to preface this examination by stating that the critique of these documents is specific to their promotion of the preferential option for the poor, not the broader social justice agenda of either Pope.

The second part of this chapter will investigate the evolution of liberation theology itself. Despite the inimical attitudes of Popes John Paul II and Benedict XVI toward liberation theology, the theology continued to evolve, mature and offer new insights into the teaching on the preferential option for the poor. The publications of Gustavo Gutiérrez\(^6\) and Jon Sobrino\(^7\) between 1988 and 2015 will be appraised.

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\(^7\) Jon Sobrino, *Jesus the Liberator* (Kent: Burn and Oates, 1994).
Part One: Catholic Social Teaching from 1988-2012

**Centesimus Annus** (On the Hundredth Anniversary of Rerum Novarum) (1991)

*Centesimus Annus* (CA) contained two salient shifts in CST which raised questions in relation to the teaching of the preferential option for the poor. The first of these shifts was its association with the philosophy of personalism.\(^8\) The second was its cautious support of Western Democratic Capitalism. Pope John Paul II was an ardent critic of Communism and although an advocate of democracy his overall writings suggest continuity of the Church’s apprehension toward unbridled capitalism.

**Pope John Paul II and the Philosophy of Personalism**

Pope John Paul II was a recognised philosopher and an advocate of the philosophy of personalism before his election to the papacy. In a 1960 publication titled *Love and Responsibility* he described the “personalist norm.”

This norm in its negative aspect, states that the person is the kind of good which does not admit of use and cannot be treated as an object of use and as such the means to an end. In its positive form the personalist norm confirms this: the person is a good toward which only the proper and adequate attitude is love.\(^9\)

The moral choice in personalism is taken by the individual; each person is an agent of his or her own moral choices. This is not an extreme form of individualism as the philosophy recognises the interdependent nature of human beings. In Christian personalism each

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\(^8\) Personalism is a philosophy that teaches of the value of each individual person. This value (or perhaps more accurately in Christian terminology “sacredness”), is a universal reality and when people come to recognise the value inherent in each other their ethical response should be one that reflects that understanding. Prominent historical figures in the philosophy were the Russian Nikolai Berdyaev (1874-1948) and Frenchman Emmanuel Mounier (1905-1950).

individual is to strive to create a society that provides justice, security and love for all people. There is no hindrance in personalism for people to make a preferential option for the poor but the decision to do so is understood as a personal and ethically responsible choice. The capacity for personalism to guide a person toward a moral life is not being questioned, but the preferential option for the poor, as highlighted by liberation theologians, originated from an experience of living and worshipping among the poor. It was the community reflecting on their common historical position through the lens of faith that led them to conclude that their existential reality what was not what God desired. Their conclusion was that the political and economic structures of their society contributed to their situation and that pursuing liberation from these structures would be commensurate with their faith.

Liberation theology argued that structures could be sinful and that it was a Christian task to oppose them. Pope John Paul II preferred to focus on sinful people, who collectively contributed to the creation of sinful structures. It was individuals who made sinful decisions. Samuel Gregg explains: “Because man is a person and the conscious subject of moral acts – a being who makes free choices about himself – he is ultimately responsible for his sinful attitudes and acts, not structures.” That sinful hearts are the basis for sinful structures is a sound argument but so too is the formative power of structures that people do not recognise as sinful.

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10 In the following chapter I will make the argument that American social activist and spiritual writer Dorothy Day was influenced by the philosophy of personalism but was also a practitioner of the preferential option for the poor.


12 See pages 92-93 on the relationship between societal structures and human formation.
The direction that Pope John Paul II takes in CA is to challenge individuals to cultivate a Christian personalist ethic that overcomes the sinful heart which is the root cause of injustice:

A great commitment on the political, economic, social and cultural level is necessary to build a society that is more just and worthy of the person. But this is not enough! A decisive commitment must be made in the very heart of man, in the intimacy of his conscience, where he makes his personal decisions. Only on this level can the human person affect a true, deep and positive change in himself, and that is the undeniable premise of contributing to change and the improvement of all society.\(^\text{13}\)

Gutiérrez did not demand conversion as a prerequisite for societal change; his methodology was dialectical. He argued that conversion begins with a commitment to justice and then continues in the practice of that commitment; conversion takes place within a process of engagement.

I have previously stated that the historically-constituted and inductive method contained within the social documents of Pope John XXIII and Pope Paul VI assisted in the formulation of the preferential option for the poor. Pope John Paul II introduced a very different criterion for his documents:

Documentation has demonstrated, however, that the encyclical writings of John Paul II intentionally stray from earlier emerging articulations of a historically conscious methodology in preference for a transcendental or Thomistic personalism as the basis for universal and absolute norms transcending all historical contingency.\(^\text{14}\)

The teaching of the preferential option for the poor emerged from a historical contingency and the theological response was praxis. The Church’s “conversion to neighbour” would result from concrete engagement with the poor. Personalism proceeds from an

\(^{13}\) Pope John Paul II, *Centesimus Annus* # 3.

\(^{14}\) Mary Elsbernd, “Whatever happened to *Octogesimo Adveniens*?” *Theological Studies* 56, no. 1 (March 1995):
anthropological ethic and directs the teaching toward an individual and ethical choice. It is important to note that the philosophy of personalism is not part of traditional Catholic teaching, this is a philosophy introduced to CST by Pope John Paul II. While personalism does not oppose the teaching of the preferential option for the poor, its individualistic understanding of a person’s moral choices, differs from the original intent of the teaching. Rather than being ensconced into the heart of the Church’s identity and mission it is encouraged as an ethical choice for the faithful. Within this framework the capacity for ecclesial renewal and therefore the wider promotion of the preferential option for the poor is limited.

**Centesimus Annus** and Democratic Capitalism

While CA marked the 100th anniversary of Rerum Novarum and paid homage to the encyclical for its pioneering direction for Modern CST, its own historical context offers insights into its endorsement of democratic capitalism. In 1989 the dismantling of the Berlin Wall and the collapse of the communist party in the Pope’s home country of Poland marked the disintegration of European Communism. The Church’s traditional political and social enemy was defeated and the Church came to the very politically charged decision to endorse a specific political ideology. This ideological sanction did however come with a number of important caveats:

15 In CA Pope John Paul II states: “The main thread, and in a certain sense, the guiding principle of Pope Leo’s encyclical, and for the church’s social doctrine, is a correct view of the human person and of the person’s unique value.” (CA # 1)

16 Democratic capitalism is a combination of a capitalist economic system and a democratic system of government. The point of debate in this ideology is how much interference the democratic system should have in the capitalist model. In CA Pope John Paul II recognises the important juridical role of the government in ensuring that the capitalist model does not become “unbridled”. (CA # 42)
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. But if by capitalism is meant a system in which freedom in the economic sector is not circumscribed within a strong judicial 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.\(^ {17} \)

A group of Catholic thinkers known as neoconservatives\(^ {18} \) wanted to extol the “virtues” of capitalism and its capacity to overcome poverty:

Theologically, neoconservatives saw the need for the Church to shift away from its historic aversion to commerce and recognize that, if backed by strong cultural institutions, virtuous behaviour, and an appropriately restrained political system, the market is by far the best economic arrangement for human flourishing and deserves ecclesial endorsement.\(^ {19} \)

Among the economic arguments presented by the neoconservative ideology was that the Church, and by extension CST, should concentrate on wealth creation rather than wealth distribution. They believed that the support for capitalism in CA was an important evolution in CST.\(^ {20} \) There is evidence that a free market approach has seen the economic emergence of many countries\(^ {21} \) but a burgeoning global inequality and a propensity toward

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\(^ {17} \) Pope John Paul II, *Centesimus Annus* # 42.

\(^ {18} \) Neoconservatives are most prominent in North America and argue that the democratic capitalist system was reflective of the natural law and Catholic doctrine. While they recognize that the Church must engage in social, political and cultural developments they believe that elements of the Catholic philosophy are already contained within democratic capitalism. They oppose “excessive” government interference and any hint of socialism. Their faith in the North American system leads to a question of cultural arrogance in a Church whose numbers are increasingly from other continents in the world? Liberation Theology was and remains anathema to this philosophy.

\(^ {19} \) Daniel Finn, “Commentary on *Centesimus annus*,” in *Modern Catholic Social Teaching*, 440.

\(^ {20} \) The debate between the neoconservatives and CST will become more hostile during the papacy of Francis. Pope Francis will call the “alliance” of CST and democratic capitalism into question. This confrontation will be examined in chapter five.

\(^ {21} \) Commenting on a United Nations development report, journalist Tracey McVeigh writes “The world is witnessing an epochal ‘global rebalancing’ with higher growth in at least 40 poor countries helping lift hundreds of millions out of poverty and into a new ‘global middle class’. Never in history have the living conditions and prospects of so many people changed so dramatically and fast.” (*The Observer*, 17 March 2013, p. 7)
individualism and consumerism is also evident and these are concerns that Pope John Paul II would reference in later documents. These were also the concerns of prominent Catholic social philosopher Jacques Maritain who supported Western democratic ideology but warned of its inherent dangers of individualism and consumerism.\(^{22}\)

The neocconservative branch of Catholicism claimed Pope John Paul II as an advocate of their ideology but recent publications of the Pope’s writings refute that theory. In an article in *The Tablet* titled “Capitalism’s trenchant critic”\(^ {23}\) author Jonathon Luxmoore argues that recently published works of the former Pope are clear evidence of his rejection of neo-liberal\(^ {24}\) economics. Prior to his election as Pope, the then Fr Karol Wojtyla said: “The Church is aware that the bourgeois mentality and capitalism as a whole, with its materialistic spirit, acutely contradict the Gospel.”\(^ {25}\) Luxmoore concludes:

> The appearance of *Katolicka Etyka Społeczna* (The Catholic Social Ethic) will require the updating of biographies of St John Paul II, especially those which portray John Paul II as a prophet of US-style capitalism. The complex and detailed text illustrates the deep thought and preparation which went into the Catholic Church’s struggle against communist misrule – a struggle substantially shaped by the insights and intuitions of Karol Wojtyla. It also serves as a reminder that no political or ideological lobby, however rich and powerful, can lay proprietorial claim to the social doctrine of the Church.

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\(^{22}\) Jacques Maritain: “The moral crisis of our occidental civilization and the disastrous spasms of our liberal, capitalist economy, exhibit all too clearly the tragedy of bourgeois individualism.” *The Person and the Common Good* (Indiana: University of Notre Dame Press, 1966), 95.

\(^{23}\) Jonathon Luxmoore, “Capitalism’s trenchant critic,” in *The Tablet* (February 2, 2019).

\(^{24}\) Neo-liberalism is an ideology that promotes a free market. It argues that eliminating price control, lowering trade barriers and reducing state influence in the economy will provide people the opportunity to create mutually beneficial economic relationships. This approach they state will enhance economic growth.

**Centesimus Annus and the Preferential Option for the Poor**

Gustavo Gutiérrez did not believe that “European Theology” resonated with the realities of the Latin American people and this theological suspicion extended to capitalism. He regarded capitalism as an unsuitable economic model if the poor were to flourish and develop. His suspicions regarding capitalism were founded on experience rather than theory. Liberation theology was not only seeking to protect the poor, it promoted the idea that the poor were to be actively engaged in their own economic development.26 Historically, the Latin American “capitalist experience” was often associated with military dictatorships backed by the USA. This association was more intent on protecting the ruling classes who were allies in fighting communism, than it was on improving the conditions of the poor. The capitalism in Latin America was a preferential option for the ruling classes, not for the poor.

In CA Pope John Paul II describes the preferential option for the poor as a “special form of primacy in the exercise of Christian charity,”27 but liberation theologians begin with the poor as persons capable of becoming creators of a new future. Pope John Paul II’s personalist philosophy promotes the dignity of all people and therefore the poor, and while he accepts that historical forces and structural injustice contribute to poverty, he emphasised that personal conversion, rather than a struggle for liberation was the appropriate response to social injustice. This methodology is in direct contrast to the theological and communal criterion in which the teaching on the preferential option for the poor was founded.

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26 This idea is endorsed in CA # 33.
27 CA, # 11.
**Tertio Mellennio Adveniente (The Third Millennium) (1994)**

Although published in 1994 as an apostolic letter, *Tertio Mellennio Adveniente* (TMA) was a preparatory document for the celebration of the 2000\textsuperscript{th} anniversary of the Incarnation, which Pope John Paul II called the axial point of human history. In the document the Pope acknowledges that throughout history Christians had assisted totalitarian regimes and contributed to grave forms of injustice. He laments the lack of knowledge and practise of the Church’s social doctrine.\textsuperscript{28} The document makes specific reference to the preferential option for the poor stating that Jesus came to “preach the good news to the poor so how can we fail to lay greater emphasis on the Church’s preferential option for the poor and the outcast.”\textsuperscript{29}

The document does contain two concrete proposals that reflect a Church that would practise an option for the poor. The first is to recall the ancient Jewish custom of “Jubilee.” Jubilee refers to a practice that sought to alleviate the burden of the poor in order to “restore equality among the children of Israel.”\textsuperscript{30} While the document recognized that the historical practices of Jubilee were more ideals than reality, they formed the basis of a social doctrine which equated justice with the protection of the weak. Jewish theology taught that the riches of creation were for the whole of humanity.

The Old Testament logic was that those who possessed these goods as personal property were really only stewards; God remains the sole owner and it is God’s will that created goods should serve everyone in a just way. Thus every fifty years was a ‘jubilee’ year in which these mechanisms for restoring the equilibrium of society were most comprehensively required.\textsuperscript{31}

\textsuperscript{28} TMA, # 36. \\
\textsuperscript{29} TMA, # 51. \\
\textsuperscript{30} TMA, # 13. \\
The second concrete proposal is in relation to international debt: “Christians will have to raise their voice on behalf of all the poor of the world, proposing the jubilee as an appropriate time to give thought, among other things, to reducing substantially, if not cancelling outright, the international debt which seriously threatens the future of many nations.”\(^{32}\) The Church acted in coalition with many organisations in this pursuit and this multi-faceted approach achieved some success.\(^{33}\)

The first of these suggestions may not necessarily equate to the preferential option for the poor entering the heart of the world’s Catholic communities but it contains potential nonetheless. The potential lies in the possibility of each community reflecting on its historical commitment to the poor and then adjusting its practices to be more faithful to the teaching on the preferential option for the poor. This ideal is of course dependent on the community’s awareness of the teaching. This would be a localised reflection and would require localised responses. If every Catholic community, religious order/congregation and organisation spent one of every fifty years reflecting on its economic and pastoral practices with a view of making a preferential option for the poor, and then acted upon its reflections, some innovative historical projects could be enacted. This process would respect local knowledge and an inductive method of determining pastoral plans. It would also be a communal rather than personal decision. Unfortunately, this is not the overriding direction that Pope John Paul II adopts in his documents.

\(^{32}\) TMA, # 51.

\(^{33}\) Anglican Archbishop Justin Welby described the campaign as perhaps the Churches finest hour in dethroning Mammon. Sustained support from Christians and others across the world led to the cancellation of more than $100 billion of debt owed by 35 of the poorest countries. (https://en.wikipedia.org/wiki/Jubilee_2000#)

*Evangelium Vitae* (EV) was published in 1995 and is a comprehensive description of what Pope John Paul II regards as the moral failure of Western society. In *Centisimus Annus* the Pope expressed support for democratic capitalism but also alluded to its inherent dangers. The Pope now makes reference to capitalisms adversarial tendencies, referring to its propensity toward individualism rather than the common good, economic efficiency over labour and market forces rather than moral values.

Even in participatory systems of government, the regulation of interests often occurs to the advantage of the most powerful, since they are the ones most capable of manoeuvring not only the levers of power but also of shaping the formation of consensus. In such a situation, democracy easily becomes an empty word.³⁴

The document refers to poverty as an “ancient scourge” and in opposition to life.³⁵ It also states that Jesus in his preaching and actions speaks to the poor³⁶ and that the unjust distribution of resources is contributing to the suffering of the poor,³⁷ but there is no real encouragement for the poor to take up their own cause and engage in creative change. These crucial elements of the Medellin Conference and liberation theology, and an integral component of the teaching on the preferential option for the poor are not endorsed despite the continuity of the “ancient scourge.” Unlike TMA there is no potential in this document that contributes to an understanding and application of the preferential option for the poor.

Pope John Paul IIs reference to the teaching on the preferential option for the poor as a “special form of primacy in the exercise of Christian charity” is telling. It describes his recognition and promotion of the teaching, but also displays the ethical, rather than

³⁴ EV, # 70.
³⁵ EV, # 27.
³⁶ EV, # 32.
³⁷ EV, # 10.
theological trajectory that the teaching took during his papacy. The Pope called on the faithful to think primarily about the poor and out of Christian charity respond generously to their needs. There is no sense of ecclesial transformation in order for the Church as a whole to live this teaching. Any new insights into a theology on the preferential option for the poor are absent. While I would acknowledge that CST documents are not theological statements, the documents of Pope John Paul II, offer no relationship between the teaching and ecclesial renewal. The preferential option for the poor is encouraged as a moral decision made by individuals who are exercising charity.

Pope Benedict XVI and the Preferential Option for the Poor

Benedict XVI was Pope from 2005 until his resignation in 2013. Prior to becoming Pope, he was the Prefect of the Sacred Congregation for the Doctrine of the Faith (SCDF) from 1981 to his election. His opposition to liberation theology was a continuing theme throughout his Vatican life. He was a major contributor to the 1984 document *Instruction on Certain Aspects of the Theology of Liberation*. In 1997 in reference to the collapse of the Berlin Wall he said: “The fall of the European governmental systems based on Marxism turned out to be a kind of twilight of the gods for that theology.”

38 In 2009 as Pope Benedict XVI he referred to

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38 Joseph Ratzinger, ‘Relacion Sobre la Situacion Actual de la Fey y la Teologia, *Fe y Teologia en America Latina*, Santa Fe de Bogota, Colombia: CELAM, 1997, p. 14. This is a seriously flawed comment by the then Cardinal Ratzinger. Liberation theology was born in the poverty-stricken continent of Latin America and was a theological response to the poverty there. Gutiérrez himself stated that “Those who wonder if liberation theology remains valid after the events symbolized by the fall of the Berlin Wall need to be reminded that the historical starting point for this theology was not the situation of the Eastern European countries. It was, and certainly continues to be, the inhuman poverty of Latin America and the interpretation we make of it in the light of faith. What we have, then, is a state of things and a theology that, at their core, have little to do with the collapse of real socialism. (*On The Side Of The Poor*, Maryknoll NY: Orbis Books, 2015, 33).
liberation theology as “deceitful” and the cause of “rebellion, division, dissent, offense and anarchy in diocesan communities.”

Deus Caritas Est (God is Love) (2006)

*Deus Caritas Est* (DCE) was issued on December 25th 2005. The document is divided into two parts. The first part focusses on the Christian life resulting from an encounter with God, which gives direction to a person’s life. Part two is a longer exposition of how the ecclesial community practises its commitment to neighbour. Pope Benedict acknowledged that the Church could not neglect charity any more than it could neglect the Sacraments or the Word, and that this charity which is based upon love of neighbour must be practised by the entire ecclesial community. There is however, no attempt in the document to connect commitment to neighbour to the teaching on the preferential option for the poor.

St. Teresa of Calcutta is presented as the paradigm of Christian love as it is in prayer that she finds the source of her love for neighbour. While I would not question the holiness of St. Teresa of Calcutta and her genuine love for the poor, is not Saint Oscar Romero also an example of Christian love and a worthy Christian model? In DCE Pope Benedict presents a paradigm for a Church that focuses on God’s love for the poor but not the struggle of those poor people in their quest for liberation.

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40 DCE, # 25.
41 DCE, # 20.
42 DCE, # 36.
43 Christine Gudorf explains the difference: “The social teaching therefore affirms the epistemological privilege of the poor unconditionally while liberation theologians deny that the condition of poverty without struggle against it confers any privilege. It is the engagement of the poor in the struggle for liberation which confers their epistemological privilege.” *Catholic Social Teaching on Liberation Themes*, 11.
In a veiled critique of Gutiérrez’s theology, the Pope dismisses the concept of an integrated liberation and in its stead offers a definition with hints of dualism: “The creation of just structures is not directly the duty of the Church, but belongs to the world of politics: the Church has an indirect duty. The direct duty to work for a just ordering of society is for the lay faithful.” This quote represents an ecclesiology that has the potential to allow clerics to be separated if not indifferent to the historical reality in which they minister. The teaching on the preferential option for the poor needs to be at the heart of ecclesial practice, not an addendum that the faithful are encouraged to live. This style of ecclesiology is one of the reasons that the teaching has stagnated. It is an approach akin to a pre-conciliar style of CST; a style that was not conducive to the initial formulation of the preferential option for the poor. Similar to the documents of Pope John Paul II, this document directs the teaching to the realm of a personal ethical choice and away from its theological origins.

**Caritas In Veritate (Integral Human Development in Charity and Truth) (2009)**

*Caritas In Veritate* (CV) was issued in 2009 and Pope Benedict XVI seems to shift the more personal themes explored in DCE and transposes them to a more global context. He continues the personalist ethical direction Pope John Paul II adopted by arguing that sinful structures are the result of sinful people and that it is people, not structures that require change:

> Economy and finance, as instruments, can be used badly when those at the helm are motivated by purely selfish ends. Instruments that are good in themselves can thereby be transformed into harmful ones. But it is man’s...
darkened reason that produces these consequences, not the instruments per se.\textsuperscript{45}

The difficulty in relation to the preferential option for the poor in this statement is that the economy and finance structures do not begin from the perspective of the poor. Even if good people manage these financial instruments will the poor necessarily benefit? To assume that if good moral people manage economic and financial instruments that the poor will benefit is still a leap of faith.

A significant innovation in the document was the ontological positioning of love. Love is regarded as part of our human essence; it is a gift from God and as we are created out of love we are created for love. Walter Kasper explains: “In Caritas in Veritate, love is the normative principle, not only in micro-relationships, in friendships, the family and small groups – but also in macro-relationships, that is social, economic, and political contexts. In this way, Benedict XVI has introduced an important, additional idea into the church’s social teaching.”\textsuperscript{46}

Feeding the hungry is described as an “ethical imperative for the universal Church” and effective development will require both the involvement of local communities and concern for the most deprived.\textsuperscript{47} The document contains a practical suggestion in relation to the preferential option for the poor by promoting micro-finance which it says will help the weaker elements of society.\textsuperscript{48}

Despite his popularity among the conservative elements of Catholicism, Pope Benedict XVI drew significant criticism from neoconservative commentators such as George Weigel for

\textsuperscript{45} CV, # 36.
\textsuperscript{47} CV, # 27.
\textsuperscript{48} CV, # 65.
some of the content of CV. The historical context in which this document emerges is the recovery period of the global financial crisis; a crisis enacted by a financial industry driven by greed/ego and void of strong judicial control.

CV expresses concern over the future of the trade union movement and the lack of provincial input (especially among the poor) to the global economy. In relation to the deregulation of the labour market the Pope says:

> These processes have led to a downsizing of social security systems as the price to be paid for seeking greater competitive advantage in the global market, with consequent grave danger for the rights of workers... Systems of social security can lose the capacity to carry out their task, both in emerging countries and in those that were among the earliest to develop, as well as in poor countries.

The Pope suggests the pressure from international financial institutions and government decisions based upon economic utility have limited the negotiating capacity of trade unions. While deregulation may assist wealth production the Pope argues it can potentially harm the fabric of society:

> Nevertheless, uncertainty over working conditions caused by mobility and deregulation, when it becomes endemic, tends to create new forms of psychological instability, giving rise to difficulty in forging coherent life plans, including that of marriage. This leads to situations of human decline, to say nothing of the waste of social resources.

There are elements of the preferential option for the poor in these quotes as the Pope critiques the historical situation from the position of the poor. Neoconservatives cried foul but sought to shift the blame for these inclusions to the Pontifical Council for Justice and Peace. In 2009 Catholic commentator George Weigel wrote an article for the *National

\[49\text{ CV # 25.}\]
\[50\text{ CV, # 25.}\]
\[51\text{ CV, # 25.}\]
Review titled “Caritas in Veritate in Gold and Red”. He argues that the “gold” or good bits of the document are Pope Benedict originals, while the “red” or bad bits are from the naïve third-world influence of the Pontifical Council for Justice and Peace. Weigel had applauded Centesimus Annus’ endorsement of democratic capitalism but he regarded Pope Benedict’s perceived encroachment on the “free market institute” as a step backward for CST and the Church. The neoconservative economic approach will be further discussed in chapter five but what I would say here is that despite their belief that the poor may benefit from their political and economic ideology, theirs is not a position that begins from the Gospels or from the perspective of the poor.

The Role of Catholic Social Teaching from 1988-2012 in the Stagnation of the Preferential Option for the Poor

Catholic Social Teaching contains both continuity and evolution. Changing historical contexts, as well as new theologies, philosophies and scriptural insights afford the respective Popes the capacity for originality. The documents of Popes John XXIII and Paul VI provided fallow ground from which the formulation on the teaching of the preferential option for the poor could grow. Popes John Paul II and Benedict XVI accepted the teaching but the framework they would proffer for CST from 1988-2012 differed significantly from their predecessors. Their commitment to the poor or their broader social justice agenda is not being questioned, but it is they who had detached the preferential option for the poor from its theological origins and incorporated it into CST. It was therefore, incumbent upon them

to ensure that the teaching continued its growth and it is my argument that they failed to do so.

There were three major areas of contrast in CST from 1963-1971 and 1988-2012 that I believe were detrimental to the understanding and application of the preferential option for the poor. The first contrast is methodological. The historical-conscious or inductive method of formulating CST evident in the documents of Popes John XXIII and Paul VI is contrasted with a universal and philosophical method employed by Popes John Paul II and Benedict XVI. The second is related to ecclesiology. Popes John XXIII and Paul VI encouraged the local "authority" of the Church and embraced the definition of the Church as the "People of God". Popes John Paul II and Benedict XVI both promoted a Church with authority more concentrated in the Church’s hierarchy. The third is in relation to an understanding of the “Spirit” and is an appendage to the definition of the Church as the “People of God.”

**First Contrast:** The inductive method for formulating CST allowed for existential experience to play a role in its formulation. To “read the signs of the times” in the light of the Gospel was not only a forerunner to Gutiérrez’s "critical reflection on praxis,” it accepted that sweeping doctrinal statements could not answer provincial justice issues. The teaching on the preferential option for the poor was influenced by this method because it afforded the poor the opportunity to read their own signs of the times in the light of the Gospel.

In contrast, CST between 1988 and 2012 became more centralised and personalist. In this process it is the Magisterium that guides the faithful to make a personal commitment to the teaching. “The inductive methodology broke the cast of a universal teaching from Rome that
is applicable to every local situation. This diversity has been limited somewhat under the centralizing influence of Pope John Paul II."\(^{53}\)

When Pope John XXIII introduced the Cardijn method of “see-judge-act” into CST he provided a formula that could contribute to the formulation of the preferential option for the poor. This is a method that allows and encourages lay people to determine pastoral decisions based on local realities. From the Latin American perspective, it is easy to see how the BECs were a local derivation of this initiative. It was the post Vatican II apostolic letter *Octogesimo Adveniens* (OA) that offered the strongest Church support on a historically conscious methodology that recognised local authority. Charles Curran argued that OA represented the approach CST should embrace:

> The approach in *Octogesima Adveniens* indicates the approach that Catholic social teaching should take. In the midst of great diversity in our world there are no easy, ready-made solutions to the manifold problems facing the world. There are important moral values (e.g., equality, participation, justice) and principles (e.g., human rights, the common destination of goods of creation to serve the needs of all), however, that have moral validity that can and should guide the building of more just social structures throughout our diversified world.\(^{54}\)

Other commentators besides Curran acknowledged the potential contained within OA but lamented its failure to exact any impact on the social teaching of Pope John Paul II or Pope Benedict XVI. In an article titled “Whatever happened to *Octogesimo adveniens*?”\(^{55}\) Mary Elsbernd argued that the apostolic letter was never implemented. Christine E. Gudorf in her commentary on the document states: “It has had a very limited impact on the way that the

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\(^{53}\) Marvin Mich, “Commentary on *Mater et magistra* (Christianity and Social Progress),” in *Modern Catholic Social Teaching*, 211.


official Church acts either internally or externally in the world, and has effectively become a
dead letter in the domain of the hierarchy.”

The teaching on the preferential option for the poor evolved under a Church leadership that
trusted and provided the poor with the opportunity to reflect and to determine courses of
action. Popes John Paul II and Benedict XVI abandoned this approach and as a result the
preferential option for the poor lost much of its grass roots drive.

**Second Contrast:** In the 1984 *Instruction on Certain Aspects of the Theology of Liberation*
one of the complaints aimed at liberation theology was that it was not authenticated by the
Magisterium and that this was a requirement for its own legitimacy. The authority of the
Magisterium was further emphasised in the 1986 *Instruction on Christian Freedom and
Liberation.* The ensuing documents of Pope John Paul II and Pope Benedict XVI continued
this Magisterium-centred approach. In TMA the spiritual difficulty evident in the modern
world is described in terms of a lack of obedience to the Church’s Magisterium:

> It cannot be denied that, for many Christians, the spiritual life is passing
> through a time of uncertainty which affects not only their moral life but also
> their life of prayer and the theological correctness of their faith. Faith, already put to the test by the challenges of our times, is sometimes
disoriented by erroneous theological views, the spread of which is abetted
by the crisis of obedience vis-à-vis the Church’s Magisterium.

The Pope’s call for a renewed obedience to the Magisterium displayed a distinct lack of trust
that the previous leadership had placed in the lay and local Church to explore its mission.

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56 Christine E. Gudorf, “Commentary on *Octogesima Adveniens (A Call to Action on the Eightieth Anniversary of
Rerum Novarum)*,” in *Modern Catholic Social Teaching*, 330.
57 *Instruction 1* states: “The meeting, then, of the aspiration for liberation and the theologies of liberation is
not one of mere chance. The significance of this encounter between the two can be understood only in light
of the specific message of revelation, authentically interpreted by the Magisterium of the church.” # 49.
58 See pages 82-83.
59 TMA, # 36.
If democracy is the political manifestation of the value of freedom and authoritarianism is the political manifestation of the value of control, the Pope would instinctively choose the latter rather than the former as the surest means to the common good. One needs only to look to the current internal ordering of the institutional Catholic Church for confirmation of this. John Paul is evidently uneasy with democratic systems in which there is no ‘paternalistic’ trump card to guarantee right decisions.60

This negative view of the role of Church authority is not shared by all, with George Weigel describing the Pope’s more authoritative approach as freeing rather than curtailing:

The purpose of authority in the Church is not to impede creativity, but to ensure that Christians do not settle for mediocrity. Authority is meant to help the individual Christian hold himself or herself accountable to the one supreme criterion of faith, the living Christ. Doctrine is not excess baggage weighing down the Christian journey. Doctrine is the vehicle that enables the journey to take place at all.61

In Pope Benedict’s DCE the authority of the Church in all matters pertaining to social doctrine is clear:

The Pontifical Council leads the way for responsibility for the Church’s charitable activity. In conformity with the episcopal structures of the Church, the Bishops, as successors of the Apostles, are charged with primary responsibility for carrying out in the particular Churches the program set forth in the Acts of the Apostles (2: 42-44).62

The authoritative approach to CST adopted by both Pope John Paul II and Pope Benedict XVI contains a methodology which challenges the faithful to obey the Church’s desire for greater charity toward the poor. There is no sense of empowerment of the poor and limited respect for the capacity of local knowledge to inform and teach the Church hierarchy. This approach is really aimed at the powerful and wealthy to become more virtuous (change) so that the poor will benefit. This approach is an inadequate

62 DCE, # 32.
representation of the teaching on the preferential option for the poor. It not only ignores the potential within the poor to enact change; its centralised and authoritative governance fails to acknowledge its own historical incapacity to effectively contribute to the teaching’s formulation.

Chapter Two of the Vatican II document *Lumen Gentium* is emphatic in its definition of the Church as the “People of God:” “Christ initiated this new covenant, the new covenant in his blood; he called a people together made up of Jews and Gentiles which would be one, not according to the flesh, but to the spirit, and it would be the new people of God.” 63 This definition marked a significant ecclesiological shift; that the Church is by her very nature missionary and that all Christians must be committed to mission. “In adopting the idea of the People of God, the council made mission the church’s raison d’etre. Now mission to the nations of the world is seen as the historic movement that defines how the church is to exist. The new people of God enter the world as missionary.” 64 The historical contingency of the people of God became a locus for reflection and while those gathered at the Medellin Conference and liberation theologians embraced this ecclesial shift it also met with significant opposition. Jose Comblin explains:

It required no particular genius to discover that the key to the council’s ecclesiology was the people of God, which provides a basis for lay initiative, different pastoral options, and temporal commitment, varying by country and continent. The notion of the people of God was the most serious threat to Roman centralization, because it was the justification for the decentralization of power in the church: everyone else would gain but the church would lose. 65

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64 Jose Comblin, *People of God*, 8.
65 Ibid., 50.
It was the institutional Church itself that gave rise to the definition of the Church as the “People of God” but this renewal challenged the Church’s own authoritarian model. The necessity of this internal revolution in relation to liberation theology and the preferential option for the poor is described by Gutiérrez: “But in the last instance we will have an authentic theology of liberation only when the oppressed themselves can freely raise their voice and express themselves directly and creatively in society and in the heart of the People of God.”

In the mid-1980s Cardinal Ratzinger expressed grave concerns regarding the definition of the Church as the people of God. The prefect of the SCDF and future Pontiff claimed that the definition was more aligned to an “Old Testament” theme and subject to a Marxist collectivist ideology. This left an important edict of Vatican II and a significant influence on liberation theology and the preferential option for the poor in a vulnerable position.

**Third Contrast:** In *Gaudium et Spes* we read “the Church is the people of God alive in the spirit of Jesus” and in *Octogesima Adveniens* “it is through Christian action that the Spirit is transforming the world.” Defining the Church as the people of God recognised that the Spirit resides within all people and in the original understanding on the preferential option for the poor, it is the faithful poor, guided by the Spirit, who are the primary interlocutors of the teaching. In contrast, both Popes John Paul II and Benedict XVI seem to favour aligning the Spirit with the institutional Church.

In our analysis we encountered two theologies of the Spirit in the documents of Catholic Social Teaching. The first theology presents an image

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67 For a fuller explanation of this reasoning see Chapter 4 “Reversal at the 1985 Synod” in Jose Comblin, *People of God*, 52-62.
68 GS # 11.
69 OA # 51.
of the Spirit which inspires believers to take up the transformation of the world into the city of God. The other theology links the Spirit with the institutional Church and the works of sanctification. While the latter frustrates, the former encourages the practice of justice.\(^70\)

Liberation theology believed that the “irruption of the poor” was a sign of the Spirit’s movement in the wider Church. This does not dismiss the Spirit affecting the operations of the Church hierarchy; after all it was the Second Vatican Council which initiated a Church renewal and the Bishops of Latin America who produced the Medellín Documents. However, if we were to ask where the spirit for the teaching on the preferential option for the poor originates, the answer is in the poor, not the Magisterium. The history of Latin America saw Church hierarchies distant from the poor. Without the Spirit working through the poor and those committed to them, it is impossible to envisage how the Church authorities could have reached such a profound teaching.

In placing the Spirit within the magisterial realm, Pope John Paul II is affirming Church authority. The people of God are to place their trust and obedience in the institutional Church, but in the case of Latin America could the institutional Church be trusted? Theologian Megan McKenna states: “The poor trust God because they know from experience not to trust us, even those of us who call ourselves faithful believers in God.”\(^71\)

Medellín, Gutiérrez or Romero never set out to ignore ecclesial authority but their experience informed them that the prevailing ecclesial structures were inadequate, if not morally inept, in respect to the cries of the poor.

The initial concerns from the Magisterium regarding liberation theology were centred on its ties to Marxist-socialism and the use of that ideology’s methodology for social analysis. But

\(^70\) Mary Elsbernd and Reimund Bieringer, *When Love is not Enough* (Collegeville MN: The Liturgical Press, 2002), 84.

\(^71\) Megan McKenna, *Send My Roots Rain* (New York: Doubleday, 2003), 298.
as the threat of communism abated, it is ecclesiology that became a focal point of contention.

The issue was not so much the danger of contamination by Marxism, but how the question of the human reality of the church is to be understood. Latin American theologians and all the prophetic bishops were convinced that poverty and the option for the poor are not purely ethical issues; they belong to the essence of the church because they are qualities of the people of God, i.e. the human reality of the church. When the notion of the people of God is removed, the option for the poor ceases to be an important issue, and the poverty proclaimed by the church is reduced to a pious spiritual exhortation addressed to each individual Catholic, without committing the institution as a whole.\(^{72}\)

The concept of the “People of God” has been missing from Church documents during the papacies of John Paul II and Benedict XVI and the emphasis has been on a juridical and clerical Church which inspires lay action only in accord with magisterial directives. This approach represents the structures and methods of a Church that I have consistently argued was incapable of formulating and contributing to the teaching on the preferential option for the poor.

The thrust of my argument in relation to the CST of Pope John Paul II and Benedict XVI is that their method of promoting the teaching on the preferential option for the poor has caused its stagnation. The teaching emerged via a method that was local, theological and communal. If the teaching of the preferential option for the poor becomes a call to obedience or an exercise in charity then it will lose its prophetic power. Liberation theology called for the whole Church to be engaged in historical projects that reflected a preferential option for the poor and these projects would lead, not only to a more just society, but to a more authentic Church. The poor were to be at the forefront of these projects. There was

\(^{72}\) Jose Comblin, *People of God*, 57.
both an individual commitment and concrete action that sought structural change. Popes John Paul II and Benedict XVI may have co-opted liberationist language but they have sedated the prophetic power of the people of God, curtailed liberation theology, recalled ecclesial centralisation and as a result the teaching of the preferential option for the poor has stagnated.

**Part II: Liberation Theology and the Preferential Option for the Poor (1988-2012)**

In Chapter One I provided an outline which suggested that the Medellín Conference and Gutiérrez’s *A Theology of Liberation* were the most significant contributors to the formulation of the teaching of the preferential option for the poor. Their intent was to respond to Pope John XXIII’s call for a Church of the poor and to investigate fully the theological and pastoral responses to the issue of mass poverty in Latin America. Their starting point was the poor, not a deliberate attempt to disrupt the universal Church. The Vatican’s hostile reaction to this nascent theology would ultimately curtail its influence, and as a consequence the Church’s effectiveness in promoting the teaching on the preferential option for the poor. Despite this rancour, liberation theologians continued to explore how their theology could enrich the theological dialogue that focussed on the poor. The hierarchal Church to its own detriment, and more importantly to the detriment of the teaching, chose to ignore their insights.

This section will explore the continuing contribution to the preferential option for the poor in the writings of Gustavo Gutiérrez and Jon Sobrino. Gutiérrez has been the primary conversationalist representing liberation theology throughout this research project. I will examine a number of his publications from 1988 through to the 2012. Liberation theologian
Jon Sobrino represents an expanding liberation theology by investigating its contribution to Christology. While their insights offered new areas of theological reflections, the historical reality was that they were writing from an isolated and therefore less influential position.

**A) Gustavo Gutiérrez: The Truth Shall Make You Free (1990)**

Strictly speaking, *The Truth Shall Make You Free* was published in Spanish in 1986, but it is the slightly revised edition published in English in 1990 that will be my reference point. The book continues to explain why the teaching on the preferential option for the poor is a theocentric option and why Christian praxis is vital in understanding and applying the teaching. It also re-emphasised the importance of BECs in the ecclesial framework of the Church in Latin America.

**Theocentric Option:** The teaching on the preferential option for the poor is based upon biblical scholarship that demonstrates that the option for the poor is God’s option. This biblically based conclusion ensures that the teaching is soundly grounded in revelation. Putting this teaching into practise in the life of believers is a community’s act of faith, not just a social program. Premature and unjust death is contrary to the God who offers humanity the fullness of life:

> The gift of life leads us to reject unjust death; the ultimate motive at work in what is called “the preferential option for the poor” is to be found in the God in whom we believe. There can be other worthwhile motives: the emergence of the poor in our time, the social analysis of their situation, human compassion, and acknowledgement of the poor as agents of their own history. But to tell the truth, for Christians the basis of this
commitment is theocentric. Solidarity with the poor and oppressed is based on our faith in God, the God of life who is revealed in Jesus Christ.\textsuperscript{73}

**Christian Praxis:** Gutiérrez describes Christian praxis in terms of love and justice; it is putting into concrete practice the commandment to love God and neighbour. This is a missionary activity that reflects and directs the “deposit of faith”\textsuperscript{74} evident in the pilgrim people of God. Gutiérrez acknowledged that the fullness of liberation can only be realised beyond this life but the historical mission of the Church is animated by this “eschatological fulfilment.” The historical Church must confront that which is disharmonious with the values of the “kingdom of life.”

Praxis is not in opposition to orthodoxy because it emphasises the nourishing relationship that should exist between orthodoxy and orthopraxis. “The emphasis on correct behaviour or orthopraxis has polemical overtones when set over against an attitude that gives an almost exclusively privileged place to the doctrinal aspect of the Christian message.”\textsuperscript{75} It is in the “practice” of the Christian life that we renew orthodoxy and contribute to its evolution.

**Basic Ecclesial Communities (BECs):** For Gutiérrez solidarity with the poor included entering their way of “feeling, thinking, loving, believing, suffering and praying.”\textsuperscript{76} This authentic solidarity with the poor should influence a movement in the Church from evangelising to the poor to recognition of their evangelising power. Throughout Latin America the BECs became part of a new ecclesial presence because they became bearers of the Good News:

\textsuperscript{73} Gutiérrez, *The Truth Shall Make You Free*, 12.
\textsuperscript{74} Gutiérrez relates the “deposit of faith” to the historical mission of the Church. “The deposit of faith is not a set of cold, warehoused truths but, on the contrary, lives on in the church, where it stimulates types of behaviour that are faithful to the Lord’s will, calls for its proclamation, and provides criteria for discernment in relation to the world in which the church finds itself.” (*The Truth Shall Make You Free*, 102).
\textsuperscript{75} Gutiérrez, *The Truth Shall Make You Free*, 103.
\textsuperscript{76} Ibid., 150.
The base ecclesial communities are undoubtedly one of the most fruitful forces at work in the Latin American church. They have their place in the broad channel cut out by the council in its reflections on the people of God and its historical journey. They are a manifestation of the people of God as existing in the world of poverty but at the same time they are profoundly marked by Christians’ faith. They reveal the presence in the church of the “nobodies” of history.  

The 1984 *Instruction on Certain Aspects of the Theology of Liberation* offered a fairly negative response to the BECs describing them as lacking in catechesis and theological formation. By the time the 1986 document *Instruction on Christian Freedom and Liberation* was published, the Magisterium described them as a “source of great hope for the church.” Whether this change was due to an unexpected “conversion” or the fact that their derogatory comments had contributed to the oppression of church personnel in Latin America is difficult to determine. Gutiérrez, while preferring to focus on the more positive approach, remained critical. In *The Truth Shall Make You Free* he states: “At the same time, we should like to have seen in the Instruction a fuller development of this new presence of the poor both in Latin American society and in the Christian community.”

There is a concerted effort on the part of Gutiérrez to align his theology and the preferential option for the poor with the Church and especially with CST. There are no fewer than 12 church documents referenced and 27 citations of the two aforementioned *Instructions*. In response to the *Instructions* Gutiérrez plots a path for dialogue. “I entertain the hope that

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77 Ibid., 152.
78 *Instruction 1*, # 52.
79 *Instruction 2*, # 69.
81 Ibid., 152.
they will help shed light on some matters and make others better understood, to clear up certain misunderstandings and prevent possible ambiguities.\textsuperscript{82}

**Gustavo Gutiérrez: Essential Writings (1996)**

This 1996 publication included writings and speeches from the 1960s through to the 1990s. I will concentrate on the post 1988 writings and two key areas: The preferential option for the poor and the Church of the poor.

**The Preferential Option for the Poor:** Theology had traditionally separated itself from any form of sociohistorical influences but liberation theology was unashamedly contextual; in fact, it was partial to the poor. It is Jesus Christ who is the primary hermeneutical principle of faith and it is through the historical Jesus that God reveals an option for the poor. “God loves preferentially the poor and oppressed whose situation of premature and unjust death contradicts the divine will in history. God’s choice tells us more about who God is than who the poor are. For this reason the preferential option is a theological norm.”\textsuperscript{83}

In a 1994 address at a University in Montreal\textsuperscript{84} Gutiérrez summarised his understanding of the preferential option for the poor by defining **Poverty, Preference** and **Option:**

**Poverty:** For Gutiérrez poverty means unjust and premature death. But he also speaks of the poor as non-persons; people who are insignificant within society and often within the Church. Re-emphasising the theocentric aspect of the teaching Gutiérrez explains that before God this anonymity is overcome and as this anonymity is overcome by God, the

\textsuperscript{82} Ibid., 87.
\textsuperscript{83} Gutiérrez, *Essential Writings*, 78.
\textsuperscript{84} Ibid., 143-146.
Church must replicate. He concluded by reminding his audience of the richness that the poor have to offer society and the Church.

Preference: Gutiérrez accepts that it is not easy to maintain a balance between God’s universal love and the preferential option for the poor, but this “preference” is God’s choice and not ours. Preference is not a gentle word; it is related to “discipleship” and calls people to engage in concrete actions that express the preference. “We prefer them not because they are good but because first of all God is good and prefers the forgotten, the oppressed, the poor, the abandoned. The ultimate and final reason for the “preference” lies in the God of our faith.”

Option: The option is not only for the rich; it is incumbent on all the members of the Church, including those whom are poor to take up this option.

Gutiérrez and the Church of the Poor

Liberation theologians exposed the inadequacy of the Church’s ecclesial structures to be in solidarity with the poor. This contention gave rise to a deeper theological question: Can you have ecclesial communion without solidarity with the poor? When Gutiérrez speaks of solidarity he speaks of a practise of the entire Church: “Solidarity expresses an efficacious love for all and in particular for the most vulnerable of society. It’s not a matter of personal acts alone; solidarity is required of the entire social aggregation and signifies a commitment of the entire Church.”

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85 Ibid., 146.
86 Ibid., 121.
The challenge to create new ecclesial structures\textsuperscript{87} was an attempt to find ways to make the Church present to and representative of the poor. In 1994 Gutiérrez wrote an article that explained this position highlighting the role of the theologian and their necessary contribution to the mission of the Church.

The role of theology is not in fact to forge an ideology which would justify social and political positions already taken but rather to help believers to let themselves be judged by the Word of the Lord. Theology cannot therefore give up its critical function of faith vis-à-vis every historical realization. I begin from the conviction that the theological task is a vocation which arises and is exercised in the heart of the ecclesial community.\textsuperscript{88}

Gutiérrez recognised the legitimacy of Church authorities to examine liberation theology. “Imperfections of language must be overcome, and inexact formulations must be corrected by concepts which do not give rise to errors in matters concerning the doctrine of faith.”\textsuperscript{89}

He did however continue to demonstrate that speaking about God took place in an ever changing historical reality and that discipleship was practised in complex social situations. The ecclesial community lived in this complex space and therefore the ecclesial community needed to contribute to the theological process.

A mandate of the practitioners of the preferential option for the poor was to transform the “absent poor” to become a “present poor.” Gutiérrez recognised that this required dialogue:

Two voices, and also two silences, are needed if people are to listen to each other. ‘To incarnate the Word of God in the diversity of human experience’ means being attentive to the cultures they express and appreciating their

\textsuperscript{87} See pages 47-49 for a summary of Gutiérrez’s original suggestions for ecclesial change.  
\textsuperscript{88} Gustavo Gutiérrez, \textit{Essential Writings}, 270.  
\textsuperscript{89} Ibid., 273.
values. It also implies ‘not being bound to any [culture] in particular.’ This last is hard to put into practice in a Church deeply rooted in Western culture.90

Gutiérrez’ post 1988 writings, beginning with the 15th year anniversary of A Theology of Liberation through to the texts quoted in this chapter are evidence of his desire to connect his theology with the wider renewal of the Catholic Church at the Second Vatican Council and to CST. He publicly declared his support for the social encyclicals of Pope John Paul II:

The renovation of the church’s social teaching energetically undertaken by John Paul II not only offers guidelines for an authentic and contemporary social harmony and for the construction of a just and new society with total respect for human life and dignity, but will also enrich the theological task and provide a fertile field of study pertinent to the social and historical context of Latin America.91

Gutiérrez acknowledged that the demands of the gospel went beyond a political project and warned of the dangers of committing oneself to false idols:

It is possible, for example, to make justice into something close to an idol if we turn it into an absolute and do not know how to place it in a context that allows it to display its complete meaning, namely gratuitous love. If there is no daily friendship with the poor and an appreciation of the diversity of their desires and needs as human beings, we can transform the search for justice into a pretext.92

For Gutiérrez, it was the teaching on the preferential option for the poor that was liberation theology’s most productive contribution to the continent and the Church:

The fundamental contribution of liberation theology, it seems to me, revolves around what is called “the preferential option for the poor.” This option shapes, deepens, and in the end corrects many commitments made during those years as well as the theological reflections linked to them. The option for the poor is radically rooted in the gospel and thus constitutes an important

90 Ibid., 152.
91 Ibid., 275.
92 Gutiérrez, “Where Will the Poor Sleep,” in On The Side Of The Poor, 118.
guideline for sifting through the fast-paced events and the intellectual currents of our days.⁹³

In 2009 Gutiérrez published an article in Theological Studies titled “The Option for the Poor Arises from Faith in Christ.”⁹⁴ In the article he argued that the option was an act of discipleship and a reason for hope. He describes the option as related to three different but intertwined concepts; the first is following Jesus, the second is theological work, and the third the proclamation of the Gospel.

1. Following Jesus: All Christians are called to follow in the footsteps of Jesus and this means practising a preferential option for the poor. Although Medellín and liberation theology spoke of the irruption of the poor into history, Gutiérrez speaks of the irruption of God into our lives via the poor. This irruption takes place in history and exposes the cruelty and oppression which many of our brothers and sisters experience. Discipleship affords us a vision of how things should be and the desire to change that which is contrary to our vision. Commitment and encounter with the poor equates to a commitment and encounter with Christ.

2. Theological Work: Theological work should make the Gospel present in human history. Liberation theology and the preferential option for the poor are signs of a theological hope that stem from a concrete commitment to the poor. They display a discipleship immersed in the present and imbued by the Gospel.

3. Proclamation of the Gospel: It is God’s commandment to love our neighbour that guides us toward solidarity with all people, with a specific preference for those “absent” from history. Faith, which is a gift from God, impels us to act in history in such a way that reflects

⁹³ Ibid., 88.
the Gospel of life. “The life of the disciple is situated within the framework of the sometimes tense but always fertile relationship between free gift and historical commitment; thus our talk about the kingdom we accept in faith is situated in the same framework.”

By the 1990’s the poverty of which Medellín and Gutiérrez had spoken of in the 1960’s remained. This presented a challenge to a Church which now acknowledged the preferential option for the poor as official Church teaching. The Church of course cannot be blamed for global poverty and liberation theology’s early vision of socialism was not up to the task but even in predominantly Catholic countries the teaching was lacking any influence. The historical reality saw the poor remain absent from any political, cultural, economic and in some cases religious influence.

Part II B) The Christology of Jon Sobrino: New Insights into Liberation Theology and the Preferential Option for the Poor

Jon Sobrino is a Jesuit priest and theologian born in Barcelona, Spain in 1938. He has lived and worked mainly in El Salvador. He was a theological advisor to the then Archbishop Romero and has endured an acrimonious battle with the SCDF, who, in March 2007 called his theology “erroneous and dangerous.” Sobrino’s Christology posits an argument which states that diminishing the historical Jesus and the experiences of the early faith community has led to a flawed Christology and it is this insufficient Christology that has negatively impacted the Church’s historical response to the poor. Sobrino argues that the image we have of God significantly impacts the way the Church understands its role in the world. He

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95 Ibid., 323.
96 https://www.catholicnewsagency.com/.../silenced_theologian_foretold_disobedience.....March
97 Walter Kasper states: “There are consequences for our image of God, for our self-understanding and for our life of praxis, for ecclesial praxis and for our conduct in the world.” (Mercy, page 82).
illustrates how a different Christology would entail a renewed ecclesial praxis, a praxis that would be partial to the poor.

Sobrino presents a two volume Christology that begins with Jesus the Liberator and then concludes with Christ the Liberator. Both texts are historically based; the first volume examines to whom Jesus addresses His message and the words and actions that exemplify His mission. The second volume looks to the post resurrection response of Jesus’ earliest followers. Sobrino incorporates a further variable by imbuing these historical insights from the perspective of the victims of history.

Sobrino claims that the Christology presented by the Latin American Church prior to the Medellín Conference had anesthetised the faithful from an integral liberation and a preferential option for the poor. This traditional Christology preached Christ as love but offered no explanation of what actions would amount to a faithful response to that love. Christ, he said, was presented as power, and those who represented power were more likely to represent Christ. There was also the image of Christ as reconciler which interprets the cross as a transcendental reconciliation between God and humanity but outside a historical conflict. “The cross has been used as a symbol for the greatest conflicts and the greatest of sins on the cosmic and transcendental plane, but not to reflect the most serious conflicts and the historical sins that led Jesus to the cross and that today lead the crucified peoples there.”98 Sobrino described the ineffectiveness of traditional Christology on the Latin American situation as “abstraction without specificity, reconciliation without conflict,

98 Sobrino, Jesus the Liberator, 16.
absoluteness without relation, these are the grave dangers of the traditional images of Christ, which Christologies can encourage, consciously or unconsciously."

For the sake of clarity, I will categorise Sobrino’s Christology into eight categories:

- A Christology of Praxis.
- The Kingdom of God.
- Conflict and the Anti-Kingdom.
- A Church of the Poor.
- The Suffering Christ and a Suffering People.
- Resurrection Christology.
- Christian Praxis and the Preferential Option for the Poor.
- The Poor and Salvation.

**A Christology of Praxis:** Sobrino asks: What image of Christ do you present to a poor and oppressed people? The answer is a liberating Christ who points toward a better future and this future is the Kingdom of God which Jesus himself proclaims. This is not an image that traditional Christology had provided: “Christology, even in its orthodox forms, can become a mechanism to prevent faith from guiding the faithful to reproduce the reality of Jesus in their own lives and to build the kingdom of God, proclaimed by Jesus in history.”

Sobrino presents simultaneous historical perspectives in order to emphasise his Christology. There is the historical Jesus and the historical reality of those who are seeking an understanding of Jesus. While his Christology has universal ramifications, it originated from the crushing experience of poverty, suffering and oppression among the poor of the Latin

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99 Ibid., 17.
100 Ibid., 3.
American continent and their faith experience causes them to look at Jesus from the facticity of their reality.

The historical Jesus calls listeners to a discipleship which demands a life lived in accord with Jesus’ words and actions. Following these actions and adhering to these words allows us to enter into a deeper understanding of Jesus. The unmerited gift of faith “comes alive” when we practise Jesus’ words and actions and this is Christian praxis. For Sobrino, failure to acknowledge and follow the historical Jesus has led to a reduced Christology, and as a consequence, a limited Church response to the historical realities in the world. Writing some years later Walter Kasper speaks of this reductionism and the need to “discover” Christ in “the other:”

Another danger was the reduction of the imitation of Christ to an individualistic understanding of salvation. This reduction can run the risk of forgetting that the inclusive character of Jesus’ substitutionary atonement means that we are actively implicated in Jesus’ act of representing us. And, consequently, “representation” transcends the heartfelt, personal connection with Jesus and must become discipleship for the sake of others.101

The Kingdom of God: While the building of the Kingdom of God in history is a key component in Sobrino’s Christology, the Bible offers no clear definition of the Kingdom and therefore interpretation is required. What we can ascertain is that this kingdom is something that Jesus desired to establish.

The word ‘kingdom’ has everything to do with power and authority. To speak of the kingdom of God is to speak of God’s power, authority, reign and rule over the material universe and over everything and everyone, including the community of human beings. The coming of the kingdom of God is the central theme and program taken up by Jesus, in which consistently,

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101 Walter Kasper, Mercy, 153.
unflinchingly, indefatigably and courageously, he shows his unrelenting commitment to that cause.\footnote{Brian Gleeson, “The Mission of the Kingdom of God,” The Australasian Catholic Record 93, no. 3 (July 2016): 327.}

Jesus is not the focus of his preaching and mission, he is always pointing toward the Father and the Kingdom of God (Mark 1: 14-15; Matt. 4:17; Luke 4:18 and 4:43). Sobrino suggests that we can gain insights into the Kingdom by examining to whom Jesus addressed the proclamation of the Kingdom.

That the poor are the first addressees of the Gospel is fact (Luke. 4:18; 6:20) but how are the poor defined in the Gospels? Sobrino says there are two definitions; one is economic and the other sociological. In regards to the economic poor he says: “The poor are those who are at the bottom of the heap in history and those oppressed by society and cast out from it; they are not therefore all human beings, but those at the bottom, and being at the bottom in this sense means being oppressed by those on top.”\footnote{Sobrino, Jesus the Liberator, 80.} Jesus is clearly partial to these people and that is why the starting point for the teaching on the preferential option for the poor is the historical Jesus. Sobrino says that by selecting the poor as the first addressees we gain insight into the Kingdom of God that Jesus is talking about.

The sociological poor are those isolated from the community by the ruling class. Their lack of adherence to the law branded them immoral and as a consequence they were marginalised.

Jesus shows how God feels towards sinners (Luke 15: 11-32). Jesus also defends sinners against those who think themselves just and despise them (Luke 18: 9-14), and defines his mission as having come to save not the healthy but the sick (Matt. 9:12). Finally he makes the assertion that
publicans and prostitutes would enter the Kingdom of God before the pious people listening to him in the temple (Matt. 21:31).\textsuperscript{104}

Sobrino acknowledges that human effort alone cannot realise the kingdom of God but that this concept of the kingdom should animate the moral actions of those who profess to follow Jesus. Brian Gleeson explains:

But while the coming of God’s reign is seen as God’s activity, this does not exclude human cooperation. There is widespread belief that one could hasten the coming of the Messiah through prayer and good works. So the coming kingdom of God is looked upon not merely as a gracious gift but also a task.\textsuperscript{105}

The preferential option for the poor is in fact obedience to God’s will and therefore commensurate with participating in the building of the kingdom of God. It is Jesus whose absolute obedience to the “divine will” includes bringing good news to the poor (Luke 4:18). We both receive and participate in this good news because it is a gift and a task. Speaking to his disciples Jesus says: “As the Father has sent me, so I send you” (John 20:21). The mission to proclaim the kingdom of God is the mission of all those who are disciples of Jesus Christ.

According to Sobrino another dangerous development of “forgetting” the relationship between Jesus and the Kingdom of God has been the historical correlation of the Church with the Kingdom.

A second and more serious form of devaluation is the spurious ecclesialization of the Kingdom of God. It is true that the church is a sign of the Kingdom (as indicated by Vatican II), but under the regime of Christendom (and of the “perfect society” years later) the church came to

\textsuperscript{104} Ibid., 96.
\textsuperscript{105} Brian Gleeson, “The Mission of the Kingdom of God,” 333.
be equated with the Kingdom of God when it effectively passed itself off as the ultimate, which leads to grave errors and even aberrations. This correlation of the Kingdom with its own ecclesial structures has created a powerful Church more at home with already existing powerful structures than with the poor.

**Conflict and the Anti-Kingdom:** The annunciation of the Kingdom of God includes a denunciation of the “anti-Kingdom.” History contains many “crucified people” and this demonstrates the existence of a massive sinfulness that demands conversion. Sin caused the death of Jesus but it continues its death march through history and the “anti-Kingdom” that Jesus opposed remains a stumbling block to those whose actions are directed toward the Kingdom of God. Building this Kingdom means defeating the anti-Kingdom and it is this conflictual position that continues to cause consternation in the Church as well as in the wider society.

The Kingdom of God points out the historical malevolence of the world for what it is, as sinful structure, as anti-Kingdom, and again clearly points to degrees of sin: It is not that structures can sin, as some claim liberation theologians say, but structures demonstrate and actualize the power of sin and, in a sense, make people sin and make it supremely difficult for them to lead lives that belong to them as children of God.

The Bible chronicles Jesus’ concern with the religious oppression of his day and the consequential creation of the sociological poor. The parables are invariably aimed at religious authorities whom Jesus believes create oppression rather than liberation. Jesus demands mercy not sacrifice and objects to religious observance usurping human need (Mark 3:4; Luke 14:2). The parable of the Good Samaritan (Luke 19: 1-10) created unease with the professional religious and with Jesus calling tax collectors (Mark. 2: 13-14),

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106 Sobrino, *Christ the Liberator*, 335.
107 Sobrino, *Jesus the Liberator*, 123.
questioning the Sabbath (Mark 2: 23-27) and warning against the “yeast” of the Pharisees (Matt. 16: 5-12), Jesus unmasks the oppressors and defends the oppressed.

Defending the poor is clearly evident in the social doctrine of the Church but the historical complexity of this defence cannot be underestimated. Many people who were engaged in the oppression of the poor in Latin America professed Christianity.

And what is said about the crucified peoples? If they bear their sufferings patiently, we acknowledge they have a certain goodness, simplicity and above all, religious sense – unenlightened and superstitious in first world terms – but nevertheless religious. But when they decide to live, when they become aware of their crucifixion, protest against it and struggle to escape from it, when they are not even recognized as God’s people and the well-known litany is intoned against them; they are subversives, criminals, Marxists, terrorists, even atheists, they who invoke the God of life....

Sobrino is writing from the perspective of oppression and poverty and is seeking to insure that opposing the anti-Kingdom contains concrete action, not a spirituality of avoidance. He also intimates that if Christianity is not partial to the poor it can find itself on the side of the anti-Kingdom.

**A Church of the Poor:** The immense numbers of poor in the Latin American continent demanded an ecclesial response and Sobrino argued that traditional transcendental Christology had blocked this response. The option for the poor is not just an ethically motivated charitable action; it is a new insight into understanding and practising the words and mission of Jesus Christ. Unlike Gutiérrez who saw no problem with the original option

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108 Ibid., 257.
for the poor becoming a preferential option, Sobrino believed that the word “preferential” diminished its radicalism. \(^{109}\)

Jesus clearly explains the danger of wealth: “It is easier for a camel to go through the eye of a needle than for someone who is rich to enter the Kingdom of God” (Mark. 10:25).

This denunciation of wealth is clear, even though throughout history people have sought all manner of subterfuge to obfuscate it. Many ways have been sought to reduce the size of the camel or enlarge the eye of the needle, but to no avail. That Jesus meant what he said seriously is shown by the disciples’ reaction: “Then who can be saved?” (v. 26), to which Jesus replies: “For mortals it is impossible, but not for God” (v. 27), which in turn should not be seen as a respite for the rich, since this real miracle does not mean that God could make riches and salvation compatible, but that “God makes possible the renunciation of riches that seems impossible to us.” \(^{111}\)

Sobrino does not dismiss the importance of those who choose a life of poverty but the dignity lies in their choice and spiritual poverty cannot hide the Church from the proximity of the suffering and death of vast numbers of poor throughout the world.

**The Suffering Christ and a Suffering People:** While crucifixion was a Roman torture, Jesus clearly stated that it was the religious elders, chief priests and teachers of the law who had him put to death (Matt. 16:21).

The historical reasons for Jesus death may be clear, but the question remains why things are like this and why there are innocent victims in history. The New Testament may interpret the meaning of the death as the greatest expression of God’s love, but the question always remains as to why God did not find different ways than this of showing his love. \(^{112}\)

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\(^{109}\) Gutiérrez had said that preference was not a gentle word and was related to discipleship. He believed that concrete action was needed in order to express this preference.

\(^{110}\) Sobrino, *Jesus the Liberator*, 82.

\(^{111}\) Ibid., 171.

\(^{112}\) Ibid., 233.
Jesus’ passion and death unfolds as a process of desertion. The process begins with Judas’ betrayal (Matt. 26: 14-16), moves through to the agony in the garden (Matt 26: 39-41); then there is Peter’s denial (Matt 26: 69-75) and the crowds shouting to free Barabbas (Matt. 27: 15-26). Finally, from the cross Jesus says to the Father “My God, my God, why did you abandon me?”(Matt. 27:46). In the history of the Church there have been a multitude of martyrs who have triumphantly gone to their death with a fervour that glorifies the Lord. This is not the case with Jesus and it is not the case with the vast majority of the poor who suffer premature death so what Christological image does the suffering Christ present?

Sobrino asks whether it is our human suffering that enables us to participate in Christ’s suffering or is Christ’s suffering an act of solidarity with the suffering in our world. Is the suffering Christ an invitation to resignation or an inspiration for liberation in history? For Sobrino the crucifixion is the beginning of a new theology – a response to suffering that continues to proclaim the Kingdom of God and oppose the anti-Kingdom. The resurrection will always remind us that evil will not triumph but Jesus is a victim of sin, a sin that continues to “crucify” countless numbers of innocent peoples.

Jesus is understood as Son of God not by virtue of a pre-established principle, as though we already instinctively possessed the measure of the divine, but on the basis of his word (his promise of the Kingdom of God), of his deeds (the signs that anticipate the kingdom), of his approach (creative freedom), of his resurrection (his victory over death).  

If the Church presents a “transcendent Christology,” a God separated from the pain and suffering in the world, then the desire to respond to suffering becomes a noble and ethical choice rather than an ecclesial praxis. “So history shows that a precipitate and one-sided penchant for the resurrection can and usually does encourage an individualism without a

113 Sobrino, Christ the Liberator, 257.
people, a hope without a praxis, an enthusiasm without a following of Jesus; in short, a transcendence without history, a God without a Kingdom.”

**Resurrection Christology:** The Gospels do not describe the experience Jesus underwent from the time He was taken from the cross to his resurrection appearances. What information we do have comes from the reactions and responses of his followers. It was those whom had been attracted to Jesus prior to his crucifixion that the risen Lord appears to and it is they that recognise He has risen. It is in the breaking of the bread (Luke 24: 13-35) or the display of the crucifixion marks (Luke 24: 36-39) that Jesus “returns to the past” to prove who He is. The resurrection is an eschatological as well as historical event and Jesus illustrates how our historical actions impact the fulfilment of the eschatological promise (Matthew 28: 18-20). Sobrino raises the question of the capacity of the resurrection, as an eschatological event to continue to reveal itself throughout history and then asks how history’s victims might experience it.

For Sobrino and liberation theology, the cross is a sign of solidarity with human suffering. It is also a symbol of unjust death and the anthropology of domination that contributed to Jesus’ death has continued throughout history. The suffering victims reveal the presence of sin in the world and are a constant reminder that it is liberation from this sinfulness that represents a sign of hope and a movement toward the Kingdom of God. “The core of this idea is that God himself accepted, in a divine manner, to become consistently incarnate in history, to let himself be affected by it and to let himself be affected by the law of sin which brings death.”

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114 Sobrino, *Jesus the Liberator*, 124
115 Ibid., 244.
Sobrino warns against faith in a transcendent God that has no need of Jesus and is indifferent to the historical project of the Kingdom of God.

Christianity is, I believe, a religion journeying through history. Christianity is certainly a religion of agape, but it gives hope on the one hand and calls us to account on the other, by the very existence of victims. These also mean that its agape has to be historical and transforming in history. In turn, Christianity provides light for the journey. There is an ultimate origin providing the initiative of everything good and that we are travelling to a final fulfilling destination (eschatology). \( ^{116} \)

**Christian Praxis and the Preferential Option for the Poor:** Christian praxis is participation in building the Kingdom of God in history. A Church that professes an option for the poor takes responsibility for the reality of the poor and Sobrino describes this response as bringing the crucified down from the Cross. This approach and imagery combine denunciation and annunciation. Denunciation begins with protest but is followed by a prophetic annunciation of what is possible. “Denunciation means bringing to light the evils of reality, its victims and its perpetrators. Prophetic denunciation has ultimacy, because it is done “in God’s name”; and as denunciation it is compassionate, because it is not done against the perpetrators, but in defence of the poor.” \( ^{117} \) What is being denounced is the anti-Kingdom but the announcement of the coming of the Kingdom requires praxis. Praxis is the conclusion of the Good Samaritan (Luke 10: 25-37) when the lawyer is told “go and do likewise.”

**The Poor and Salvation:** When examining the relationship between the poor and salvation Sobrino interprets the poor as victims of the anti-kingdom or anti-salvific practises of the world. This does not mean that the poor are without sin, but rather that their situation elucidates the sin of the world. The hymn *Were You There They Crucified My Lord* was not

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\(^{116}\) Sobrino, *Christ the Liberator*, 334.

\(^{117}\) Ibid., 28.
written in grand ecclesial halls but by slaves. I refer to this as a praxis hymn because it invokes a recognition of the suffering Christ while simultaneously highlighting the suffering victims who sang it; that is victims who reveal the sin of the world. It was the slaves’ experience of suffering that led them to a deeper understanding of the injustice inflicted upon Jesus.

For Sobrino the teaching on the preferential option for the poor directs the Church to look at history from the perspective of the poor and this poor perspective then guides the Church’s historical mission. Having incorporated the teaching into its tradition, the Church’s hierarchy needed to provide a framework which could effectively represent the teaching and its mission. This did not occur and this lack of direction was to the detriment of the teaching.

A new record of beatifications and canonizations was set in the pontificate of John Paul II, but not one of the men and women who were murdered in the Third World for practicing justice, defending the poor, of being faithful to Jesus have been recognized by the Vatican. At the solemn ecclesiastical level they remain nameless.\(^{118}\)

The poor challenge the conscience of the non-poor and afford them the opportunity for conversion. The non-poor have a significant role to play in the transformation of the anti-Kingdom and their example and solidarity with the poor is a witness and an opportunity for renewal for the whole Church. Dorothy Day, Saint Oscar Romero, Gustavo Gutiérrez, Jean Donovan and many others are “non-poor” examples of opposing the anti-Kingdom:

The poor unleash solidarity, which, as has been said so beautifully, is “the tenderness of the peoples.” We have defined it as “unequals bearing one another mutually.” But we need to analyse the concept in depth and see what poor people contribute to it. Solidarity means poor people and

\(^{118}\) Ibid., 30.
nonpoor people mutually bearing one another, giving “to each other” and receiving “from each other” the best they have, in order to arrive at being “with one another.” Often what is given and what is received are in quite different orders of reality; material aid and human acceptance, for example. And what the nonpoor receive may be, as a humanizing reality, superior to what they give.  

Sobrino’s Christological reflections were a witness to the maturation of liberation theology and enhanced the theological credentials of the preferential option for the poor. He offered a pre and post resurrection Christology that highlighted the importance of theological praxis. Outside of promoting a spirit of resignation, he highlighted the lack of traditional Christological concepts in relation to the poor. Reconciling a loving God with the horrors of history should not lead solely to justice in the next life, which is an “ice cream on gold plates” theology. There are people and structures that are anti-Kingdom and both need to be confronted.

Due to the Vatican’s hostility toward liberation theology, Sobrino’s theological insights, which could have assisted in the understanding and application of the teaching on the preferential option for the poor went largely ignored.

**Liberation Theology: Critics From Within**

While I have summarised the Magisterium’s criticisms of liberation theology, there were other critics who, despite favouring many tenets of the theology, believed it contained serious flaws. Liberation Theology began at a time when various strands of Marxist-Socialism held significant power in many parts of the world but by the mid-late 1980s this...
ideology was in rapid decline. By the 1990s it was clear that democratic capitalism was gaining the ascendancy in the global battle of the ideologues. Joe Egan explains:

Liberation theology opted for revolutionary socialism as the gateway to realising the kingdom of Jesus and the liberation it promised, but that particular ideology proved to be completely inadequate to the task, incapable of articulating a credible stance towards economics and finally collapsing under the weight of undeliverable historical expectations.¹²⁰

Theologian Tina Beattie published an article in 2007 titled “Has Liberation Theology Had Its Day?”¹²¹ Beattie acknowledged the historical contribution of liberation theology to grassroots church involvement in social justice, but she argues that a new climate of human rights has given birth to a new theology that expresses God’s preferential love for the poor. Beattie based her thought on her participation at the World Forum for Theology and Liberation held in Africa in 2007. Beattie bemoaned the antiquated Marxist economic analysis saying: “Just as Aquinas had baptised Aristotle, so liberation theologians sought to baptise Marx – to the chagrin of the Vatican and atheist Marxists alike.”¹²² Beattie was not writing as an opponent of liberation theology but as a critic for its lack of evolution. “In an era when the language of human rights has taken the place of socialism among those who seek to transform society, theologies must once again reformulate what it means to express God’s preferential love for the poor.”¹²³

Ivan Petrella is a liberation theologian who argues that despite liberation theology’s provincial beginnings it was the first theology to expand the historically limited Western dominated theological discourse. Petrella also stated that liberation theology’s contextual

¹²⁰ Joe Egan, “From Moment to Moment: Liberation Theology and the Demise of Neolithic Man,” in Movement or Moment, ed. Patrick Claffey and Joe Egan (Bern: Peter Lang, 2009), 208.
¹²² Ibid., 4-5.
¹²³ Ibid., 4-5.
methodology was correct and had universal appeal because no-one can escape context and the Church was always a Church in history. Gutiérrez described the poor as non-persons and it was political and economic structures that perpetuated this anti-evangelical situation and their premature death. Petrella agrees: “In economic terms, the lives of the wealthy are far more important to the workings of the global economy than the lives of the poor; this is indeed economically logical that illness and death should occur in places where earnings will be less.”

Petrella also argues that the current global economic structures dehumanize: “The ability to play a part in the market is required for recognition as a member of society. The more you can consume or produce, the greater the value. Market logic trumps human life. Within this logic, human beings are reduced to objects of greater or lesser worth.” Ostensibly both Gutiérrez and Petrella concur that the global economic system makes a preferential option for the rich (my words) and that the preferential option for the poor is the correct Gospel path. Where they differ is in their solutions. Petrella believes that Latin American liberation theologians, including Gutiérrez, were prone to what he calls “gigantism.” That is, they see one giant and monstrous force oppressing the poor (capitalism) and initially at least wanted to replace it with another (socialism).

Their obsession with the gigantic forces oppressing the poor, however, is paralysing. It operates in 3 steps: first, the theologian asserts the focus on economic oppression and social liberation. Second, the theologian presents a picture of the causes of oppression in which they are of such magnitude that they seem practically insurmountable. Third given the intractable conditions of oppression, paralysis ensures.

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125 Ibid., 19.
126 Ibid., 101.
Integral to liberation theology was the undertaking of concrete historical projects and this, Petrella asserts, should remain a cornerstone of liberation theology. Once the Church denounces a particular action as detrimental to the poor it must also announce historical projects that represent the Church’s preferential option for the poor. These projects need to be undertaken no matter which political ideology is in power. Without these projects the preferential option for the poor becomes an idealised theory, a teaching that is stagnating and this according to Petrella has already occurred. “Liberation theology’s approach to capitalism reveals itself as a straightjacket that must be escaped. The very way liberation theology theorizes capitalism makes structural change a virtual impossibility; liberation theology’s approach to capitalism blocks rather than opens avenues for change.”127

While I have presented an argument which suggests that the authoritarian, centralised and ethical approach to the teaching on the preferential option for the poor during the papacies of John Paul II and Benedict XVI have caused the teaching to stagnate, Petrella also argued that liberation theologians have contributed to its stagnation. He suggests that if the teaching is to avoid stagnation, then the Church and liberation theology need to undertake historical projects that represent the teaching.

Petrella suggests a new approach called “Critical Legal Theory”.

For example critical legal theory would allow liberationists to move beyond a blanket condemnation of ‘capitalism’ or ‘globalization’ and instead examine the way the legal minutiae of the variety of actually existing capitalism affects the distribution of resources in society. When specifically examined, a market economy is a particular legal regime and so law, in the form of the regime choice, influences the distribution of income achieved.128

128 Petrella, Beyond Liberation Theology, 138.
Petrella’s thesis is not a recommendation for capitalism; it is a challenge to liberation theologians to avoid being shackled by any overriding ideology that may incapacitate their endeavours to liberate the poor. Similar to Tina Beattie, Petrella is seeking a renewal of liberation theology:

The time to reinvent liberation theology is now, Latin American liberation theology was born with the promise of being a theology that would not rest with merely talking about liberation but would actually help liberate people from their material deprivation. It thus had two parts: a revealing of Christianity from the perspective of the oppressed and the construction of historical projects: models of political and economic organization that would replace an unjust status quo.129

While these criticisms are worthy of investigation, both Gutiérrez and Sobrino did continue to offer new theological insights that were largely ignored and therefore liberation theology continued its struggle to impact episcopal strategy. David Tomb provides a summary of the variables that contributed to the declining position of the theology:

Its terminology of liberation and its political and economic analysis growing steadily less relevant to a new context; the difficulties of engaging with wider dimensions of oppression in a creative and energising way; local pressures from conservative bishops and centralised opposition in the Vatican; a decline in the base communities as some members moved to more secular politics and others joined Pentecostal churches.130

I present these very brief critiques as a reminder that liberation theology itself needed to evolve, but as a praxis-theology I believe it contained within its own methodology the capacity to do so. The failure of the Church’s teaching on the preferential option for the poor to impact the Church (and I would argue the world) meant that renewal was a necessity in both the Church and in its theology.

129 Petrella, The Future of Liberation Theology, vi.
130 David Tombs, “Latin American Liberation Theology: Moment, Movement, Legacy,” in Movement or Moment, 47.
Summary and Transition

While my personal introduction to the teaching on the preferential option for the poor came via liberation theology, it has been my argument in this thesis, that one does not need be a liberation theologian to practise the teaching. I will further illustrate this position in the following chapter when I examine the life of Catholic social activist and spiritual writer Dorothy Day. What I have sought to demonstrate in this chapter is that particular components used by the theologies of liberation were successful in the birth and nurturing of the teaching. Pope John Paul II and Cardinal Ratzinger/Pope Benedict XVI accepted the teaching but rejected many of the components associated with its formulation. They then failed to replace these components with anything of substance and as a result the teaching stagnated.

Gutiérrez’s theological method of critical reflection on praxis provided a framework that enabled a theology of poverty to arise within the universal Church. Jon Sobrino argued that an inadequate Christology had limited the Church’s capacity to understand and respond to the poor. Traditional Christology’s were void of any sense of praxis or solidarity with the poor. In fact, the idea of resignation became an important Christological theme and this focus contributed to an unchanging position for the poor.

Jose Comblin argued that the Second Vatican Council created an identity crisis which Pope John Paul II sought to rectify. “Vatican II announced the end of Christendom, but it could not change established mindsets nor did it have any other model to present. The lack of model caused an identity crisis, which John Paul II resolved by closing the doors and windows and returning to the Christendom regime.”131 This approach diminished the significance of the

131 Jose Comblin, People of God, 144.
Church as the “People of God” and as a concomitant an important ingredient in the understanding and application of the teaching of the preferential option for the poor.

Despite Gutiérrez’s support for Pope John Paul II’s extensive social justice agenda, the Pope dismantled the variables that were essential to the formulation of the teaching on the preferential option for the poor. Liberation theologians were attacked and isolated, bishops sympathetic to the theology were replaced with opponents, BECs were brought under episcopal control, and a pre-conciliar centralised authority established. Those now responsible for the dissemination of the teaching promoted it as an important ethic that the faithful were encouraged to practise. It was withdrawn from the theological and ecclesial realms that had provided fertile ground for its growth and this approach failed to inspire the Church into a deeper understanding and application of the teaching.

CST is not the only avenue for the dissemination of the Church’s social doctrine. In fairness to Popes John Paul II and Benedict XVI, there is evidence that the Church at both an official and unofficial level is seeking ways of structurally improving the lot of the world’s poor. Tina Beattie comments on a World Social Forum (WSF) she attended in Nairobi in 2007. The WSF is a non-aligned, secular anti-globalisation movement. The theme for the conference was “Another World is Possible” and the opening address was given by Archbishop Desmond Tutu. Beattie reports that the large Christian presence surprised the organisers and the Economist magazine reported that Catholics contributed the biggest single group of anti-poverty campaigners at the conference. The desire to engage with the secular world and look for ways of practising the preferential option for the poor on the global stage is heartening.

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On the other hand the Pontifical Council for Justice and Peace expressed frustration at the lack of knowledge, (which includes the teaching on the preferential option for the poor), throughout the Church of the principles contained within CST: “This doctrinal patrimony is neither taught nor known sufficiently, which is part of the reason for its failure to be suitably reflected in concrete behaviour.” 133 This is a remarkable statement that begs the question of who is responsible for this lack of teaching or what I would prefer to call, lack of formation.

Among the reasons that the wider Catholic community has failed to embrace the principles of CST may be in the methodology proposed in the Compendium. The text states that “the entire people of God have a role to play as the Church fulfils her mission” 134 but then explains how the process toward that mission is to be enacted:

> In the particular Church, the primary responsibility for the pastoral commitment to evangelize social realities falls to the Bishop, assisted by priests, religious men and women, and the laity. With special reference to local realities, the Bishop is responsible for promoting the teaching and diffusion of the Church’s social doctrine, which he should do through appropriate institutions.

This process places an inordinate amount of responsibility on the hierarchal structures of the Church. The model is dependent on bishops and priests to communicate the preferential option for the poor to their respective dioceses and communities. In short, the teaching will languish if bishops and priests are lacking in commitment and interest. This again highlights the importance of the teaching stemming from grass roots communities, rather than episcopal hierarchies.

133 Pontifical Council for Justice and Peace, # 528
134 Ibid., # 538
In *Centesimus Annus* Pope John Paul II wrote: “As far as the Church is concerned, the social message of the Gospel must not be considered a theory, but above all else a basis and a motivation for action.”\(^{135}\) In the methodology proposed by Gutiérrez it is action that provides the ingredients for reflection which then leads to theology; furthermore this action begins with the poor. If the Church’s mission was to announce Good News to the poor, Gutiérrez believed that an option for the “victims of history” was a necessity. In the theology of the preferential option for the poor, God’s saving action includes the transformation of society; that is the creation of new persons and new communities:

Gutiérrez argues that if Christ’s grace is available to all, even non-believers, the criterion for salvation must be valid for believer and non-believer alike. This criterion he says is love. The one who loves is the one who is saved, that is the one who enters into communion with others is the one who enters into communion with God. This means that salvation occurs not simply in the church and in heaven but in the heart of history and through the practice of love.\(^{136}\)

As Pope, John Paul II made regular references to the teaching on the preferential option for the poor but the style and methodology of his papacy saw it struggle to take root in the heart of ecclesial practise. He has favoured orthodoxy over orthopraxy; doctrine over biblical renewal; an ecclesiology with an emphasis on hierarchal structures rather than the “People of God,” and an ethic of personalism over of a theology of praxis. Pope Benedict maintained this position. I am not arguing that orthodoxy, doctrinal authority, hierarchal structures or personalism prevent a person from practise the preferential option for the poor, but I do propose that in dismissing the practises that nurtured the teaching and having failed to create effective alternatives, the Vatican was complicit in its stagnation. Ultimately their conflict with liberation theology created a stumbling block that destroyed the potential

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\(^{135}\) Pope John Paul II, *Centesimus Annus*, # 57.

\(^{136}\) Dean Brackley, *Divine Revolution*, 71.
for meaningful dialogue that could have enhanced the teachings understanding and application.

Orthopraxy is not opposed to orthodoxy but its existential approach calls for constant vigilance in regard to orthodox efficacy. Orthopraxis promotes dialectical methods which understand the constant relationship between faith, history and action; human experience becomes an essential ingredient of theological reflection and it was these reflections that enriched the Medellín Conference, liberation theology and the teaching of preferential option for the poor.

Although the Pope has frequently spoken out against human rights violations and on behalf of the poor, his message is belied by the Vatican’s actions in strengthening control from Rome to the detriment of the local churches that work with the poor and on behalf of human rights. The appointment of conservative bishops and the emphasis on orthodoxy above all else have forced liberal church leaders into a defensive position.  

The polemic incursion of liberation theology into Church history was an innovation at a historical, ecclesial and theological level. In liberation theology the poor became an authentic theological source for understanding and practising Christian truth. The Church needed to continue to preach the “dangerous memory” and “radical mission” of Jesus Christ and seek creative ways in which the teaching on the preferential option for the poor could be understood and applied. Liberation theology is not the only approach to the teaching but it certainly provided a framework that encouraged the teaching’s expansion.

Liberation theology called Christians to a radical discipleship and this discipleship included living an option for the poor:

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137 Penny Lernoux, “The Journey from Medellín to Puebla: Conversion and Struggle,” in Born of the Poor: The Latin American Church since Medellín (Notre Dame IN: Notre Dame Press, 1990), 58.
Christ and the Gospel display Jesus’ identification with the poor. Liberation theology has correctly taught that it is Christ who teaches us that the option for the poor should be made in concrete choices and circumstances (Matt 25: 31-46). Ongoing and communal conversion is an imperative if liberation is to become manifest in the world as it moves forward into the future.\(^{138}\)

In the following chapter I will interrupt the historical timeline that had guided this research project and examine the life of Dorothy Day (1897-1980). The reasons for doing so are multiple. Dorothy Day was inspired by pre-conciliar CST; she was an advocate of the philosophy of personalism, and, as far as can be gauged, theologically conservative. Her unique and radical ministry began well before the Medellín Conference and the publication of *A Theology of Liberation*. Dorothy Day epitomises the argument that one does not need to be a liberation theologian to practise the preferential option for the poor. However, despite my personal admiration for her, I will argue that her example, although an incredible witness, failed to insert itself into the heart of the Church’s identity and mission. That it remained, up until 2013 at least, only liberation theology that had provided an effective pedagogy that could direct the universal Church toward an understanding and application of the teaching on the preferential option for the poor.

Chapter Four

Dorothy Day (1897-1980): Prophet of the Preferential Option for the Poor

An argument that I have developed throughout this research project is that one does not need to be a liberation theologian to be a practitioner of the preferential option for the poor. I qualified this statement by recognising that liberation theologians, primarily Gustavo Gutiérrez, provided a theological framework that assisted in the formulation and development of the teaching. In this chapter I will present American social activist and spiritual writer, Dorothy Day, as a paradigm of someone who was not a liberation theologian, yet fully embodied what practising the preferential option for the poor entails.

This chapter will be presented in seven parts. The first part will be a brief introduction to the historical life of Dorothy Day. The second part will examine how she came to understand her mission to the poor as “Living the Gospel.” The third part will offer a theological framework for her mission. Dorothy never regarded herself as a theologian and she did not have liberation theology as a guide, so what theological criterion led her to take a preferential option for the poor? The fourth part will examine how she lived a preferential option for the poor, with specific reference to its close proximity to Gutiérrez’s threefold definition of poverty.⁴ The fifth part will briefly examine the correlation that Dorothy believed existed between Church liturgy and social justice. The sixth part will explore how her commitment to the poor was combined with her pacifism. The seventh and final part will be my conclusion. Despite my admiration for Dorothy and her solidarity with the poor, I will

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⁴ See pages 46-47.
conclude by suggesting that it was the theological framework presented by Gutiérrez, rather than the mission of Dorothy Day that contains greater potential for integrating the teaching into the heart of the Catholic Church’s identity and mission.

Part One: An Introduction to Dorothy Day

Dorothy Day did not grow up in a particularly religious family although she indicated an interest in religion during her formative years. Throughout early adulthood she tended to dismiss religion and aligned herself with the bohemian movement. She joined the socialist party and the suffragists; was married and separated within a year and then had a child with her de-facto partner Forster Batterham. Though she would have liked to have married Batterham, he refused, believing marriage to be a bourgeois institution. Batterham was also an atheist who regarded religion as superstition.

Even at this early stage of her life Dorothy was committed to social change. She worked as a reporter for the socialist newspaper “The Call,” and was imprisoned for her participation in a suffragist protest (1917). Reflecting on that imprisonment Dorothy wrote:

I remember that sense of shame at turning to God, as I lay in a cell at Occoquan, Virginia, so many years ago. I wanted to stand on my own feet. I thought there was something ignoble about calling for help in my despair, at my first taste of real destitution, of utter helplessness in the face of the vast sufferings of the world. I read the scriptures... It was the only book we were allowed in jail. But I was ashamed and turned away in the pride of youth for another dozen years.²

There were two significant influences on Dorothy’s “spiritual awakening.” The first was her engagement with the poor migrant Catholics that she came to know during her time as a socialist reporter, and the second was the birth of her daughter, Tamara.

Dorothy’s engagement with the poor awakened her sense of community and taught her the importance of worship. She was impressed by the poor migrants’ solidarity and faith in the midst of struggle and vulnerability. “It was the Irish of New England, the Italians, the Hungarians, the Lithuanians, the Poles, it was the great mass of the poor, the workers, who were Catholics in this country, and this fact in itself drew me to the Church.”

Dorothy’s transition into the Catholic Church was not immediate as she struggled to connect her commitment to the “masses” with an interest in a Church, that from her perspective, lacked solidarity with the poor. Dorothy and many of her bohemian friends questioned whether her conversion to Catholicism would align her with the wealthy and people of prominence. “Was she betraying the victims of injustice and oppression by entering a Church whose priests so often ignored the poor and said nary a word about social justice? Why so much talk about charity and so little about social justice?”

Dorothy Day was officially received into the Catholic Church on December 28th, 1927 but it was not a particularly joyful experience. “I had no sense of peace, no joy, no conviction that what I was doing was right. It was just something that I had to do, a task to be gotten through.” Dorothy’s journey into Catholicism led to her separation from Forster Batterham, but it was her firm belief that it was Jesus who was pushing her in that direction. Forster, on

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4 Thomas Bokenkotter, Church and Revolution, 410.
the other hand, believed the Church was corrupting Dorothy. Dorothy transitioned into a life of celibacy although she maintained contact with Forster throughout her life.

The second significant change in Dorothy’s spiritual journey took place with the birth of her daughter Tamara in March 1927. After the birth she wrote:

No human creature could receive or contain so vast a flood of love as I often felt after the birth of my child. With this comes the need to worship, to adore. I had heard many say that they wanted to worship God in their own way and did not need a Church in which to praise Him, nor a body of people with whom to associate themselves. But I did not agree to this. My very experience as a radical, my whole make-up, led me to want to associate myself with others, with the masses, in loving and praising God. Without even looking into the claims of the Catholic Church, I was willing to admit that for me she was the one true Church.6

Dorothy’s spiritual journey was not an easy one. “In choosing religion, she chose an arduous path. It is often said that religion makes life easier for people, provides them with the comforting presence of a loving and all-knowing father. This is certainly not how Day experienced it.”7 In spiritual terminology Dorothy saw a transcendent purpose in sacrifice, suffering, and self-surrender. She believed that sacrifice and suffering were tied to a much greater purpose, a truth that led us to God.

Dorothy Day chose what most would regard as a difficult route for holiness. She wasn’t just choosing to work for a non-profit institution in order to have a big impact; she was seeking to live in accord with the Gospels, even if it meant sacrifice and suffering. She believed that people were truly “formed” through suffering.8

The early days of Dorothy’s Catholicism did not immediately lead to what would become her life’s mission. She spent a number of years writing articles for various publications and

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8 Ibid., 93.
bringing up Tamara. Although she was still engaged in defending and improving workers’ rights she felt she needed to do much more:

How little, how puny my work had been since becoming a Catholic, I thought. How self-centred, how ingrown, how lacking in sense of community! My summer of quiet reading and prayer, my self-absorption seemed sinful as I watched my brothers in their struggle, not for themselves but for others. How our dear Lord must love them, I kept thinking to myself. They were His friends, His comrades, and who knows how close to His heart in their attempt to work for justice.  

Dorothy Day had neither liberation theology nor the teaching of the preferential option for the poor to guide her toward her defining mission, but she shared their belief that the Gospels illustrated God’s special love for the poor. Furthermore, this love required concrete action, and Dorothy, along with Peter Maurin founded the Catholic Worker Movement, a movement which came to support, represent and defend the poor. There were other influences in Dorothy’s life and mission such as Catholic Social Teaching (CST), the philosophy of personalism, and as previously mentioned, her concrete engagement with the poor, but her overall mission and ministry was founded in the Gospels.

**Part Two: Living the Gospel**

On May Day 1933 Dorothy Day and Peter Maurin launched a publication titled *The Catholic Worker*. Selling for a penny per copy to ensure that all could afford it, the publication’s first

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10 There will be brief reference to Peter Maurin in the following pages of this chapter, but I could easily have presented him as an example of someone who was not a liberation theologian yet lived a preferential option for the poor. Maurin’s influence on Dorothy was emphatic. In her biography *The Long Loneliness*, Dorothy wrote “And when I returned to New York, I found Peter Maurin – Peter the French peasant, whose spirit and ideas will dominate the rest of this book (*The Long Loneliness*) as they will dominate the rest of my life.”
recipients were those “sitting on park benches, or huddled in shelters or walking the streets in vain search for work and ... losing hope.”¹¹ This first issue of The Catholic Worker wanted to show those who were struggling under the immense pressure of the Great Depression (1929-1939) that the Catholic Church and its social teaching cared about them and their plight.¹² The Catholic Worker newspaper was but one component of the objective of the Catholic Worker Movement (CWM), and it would be impossible to understand and appreciate the spirituality and mission of the CWM without reference to Peter Maurin.

Peter Maurin was born in France in 1877 and died in America in 1949. Like Dorothy he was influenced by the philosophy of personalism and was a powerful advocate of CST. He rejected fascism, communism and capitalism, preferring to place his faith in the “dynamic” message of the Church. Maurin’s commitment to poverty was a spiritual choice that demanded concrete solidarity with the poor:

One of the strongest convictions that he had acquired in all his variegated experience was a Franciscan sense of the beauty of poverty. He lived totally at the mercy of circumstance, depending for food and lodging on whatever money he might happen to make at his odd jobs. His unencumbered lifestyle allowed him ample time for reading and study and he gradually shaped a very personal vision of the kind of social order he thought the Gospel called for.¹³

Maurin consistently practised the traditional Catholic conventions of Mass, confession, fasting and prayer, but rather than separating him from the poor, they led him into a deeper solidarity with them. Maurin was an ardent believer in the Catholic principle of the Common Good; in fact one of his greatest ideals was to create a society where it was easier for people

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¹¹ Dorothy Day and Peter Maurin, Catholic Worker, Volume 1, No. 1, 1933.
¹² The publication was for all people but the first recipients were the poor themselves. The Catholic Worker Paper did not filter down from the Church hierarchy to the masses; it was written in the midst of the poor masses and was addressed to them. The parallels with the later liberation theology of Jon Sobrino are clear. Sobrino wrote of the good news of Jesus being first addressed to the poor masses.
¹³ Thomas Bokenkotter, Church and Revolution, 412.
to be good. “According to St. Thomas Aquinas man is more than an individual with individual rights; he is a person with personal duties toward God, and his fellow man. As a person man cannot serve God without serving the Common Good.”¹⁴ For Maurin, to seek the Common Good was the responsibility of all Christians who believed in the biblical commandment to love thy neighbour. Dorothy stated: “He (Peter) always reminded me, no matter what people’s preferences, that we are our brother’s keeper, and the unit of society is the family; that we must have a sense of personal responsibility to take care of our own, and our neighbour at a personal sacrifice. This is the first principle, he always said.”¹⁵

With Dorothy Day and Peter Maurin at the helm, the Catholic Worker paper grew rapidly. Within a few months of publication it went from selling 2,500 copies to 75,000 and eventually passed the 100,000 mark. Besides the publication of the Catholic Worker, the CWM provided a soup kitchen which during the Depression fed over 1,000 people a day. It also provided accommodation for the most-needy, started a number of agrarian communes and continued its peaceful civil disobedience in relation to economic practises that harmed the poor. The paper also challenged the Church by highlighting its weak response to racial segregation¹⁶ and its anti-Semitic tone. The CWM was a radical incursion into the life of the Catholic Church; it was a religious movement that incorporated social, cultural, philosophical and political idealism into its mission.

Maurin’s last years were a struggle as he suffered both mentally and physically. Upon his death Time magazine said he was a joyful Christian who wanted to build a society where it was easier for people to be good. On the front page of L’Osservatore Romano it said that it

¹⁴ Peter Maurin, Easy Essays, 44.
¹⁶ After visiting Alabama and seeing the treatment of black people Day wrote: “Oh the suffering, the poverty of these poor in Christ, and the indifference of Christians.” (William Miller, Dorothy Day: A Biography), 180.
was possible that a saint had died. Dorothy herself wrote: “He was truly humble of heart. Never a word of detrac
tion passed his lips and as St. James said, the man who governs his
tongue is a perfect man. He was impersonal in his love in that he loved all, saw all others around him as God saw them, saw Christ in them.”¹⁷

For Dorothy living the Gospel was discipleship and discipleship meant following Jesus Christ. This following demanded self-sacrificial love; a sacrifice motivated by love of God and love of neighbour. While the passion and death of Jesus was His greatest act of sacrificial love, Dorothy believed that the entire life of Jesus was a passion and that she was called to emulate His special concern for the poor. Her conviction of the need to be in solidarity with the poor was rooted in a spirituality that equated the poor with Jesus and whatever you did for the poor you did for the Lord (Matt. 25: 31-46).

Liberation theologians would point out that the preferential option for the poor was a biblical teaching, but Dorothy and the CWM had already determined this.

His (Jesus) teaching transcended all the wisdom of the scribes and Pharisees, and taught us the most effective means of living in this world while preparing for the next. And He directed His sublime words to the poorest of the poor, to the people who thronged the towns and followed after John the Baptist, who hung around, sick and poverty-stricken at the doors of rich men. ¹⁸

For Dorothy and the CWM this special love for the poor included the provision of accommodation for society’s most vulnerable, but the biblical inspiration behind this endeavour extended beyond the availability of emergency accommodation. The CWM wanted to create community among the poor in order for them to have a sense of belonging. This was a concrete response to the biblical commandment to “Love thy

¹⁷ Ibid., 274.
¹⁸ Dorothy Day, The Long Loneliness, 205.
Dorothy not only needed to live in community she wanted to create community for those who had found themselves isolated from society. “To Day, separation was sin: separation from God, separation from one another. Unity was holiness: the fusion between people and spirits. The Catholic Worker fused a lot of things together.”

Dorothy not only opened hospitality houses for the most-needy, she lived there. Her whole-hearted commitment was underpinned by a spirituality that was demanding. For Dorothy sacrifice, suffering and self-surrender led to the transcendence of self and the truth of God.

Dorothy managed to connect social justice with spirituality and a prophetic voice with loyalty to the Church. In an era and environment where charity was the preferred response to social concerns and spirituality was understood and practised via traditional piety, Dorothy was prophetic. While her mission caused a number of clashes with bishops her loyalty to the Church, a loyalty which Gustavo Gutiérrez would later emulate, remained. This attitude is best summed up in her own words. “Where else shall we go except to the Bride of Christ, one flesh with Christ? Though she is a harlot at times, she is our Mother.”

The CWM was grounded in a radical interpretation of God’s special love for the poor, and this Gospel inspired love for the poor directed it into the political and economic arenas. The CWM challenged the morality of the capitalist economic model from the perspective of the poor and this stance was a precursor to what the liberation theologians of the 1970s-80s did and what Pope Francis currently does. Historically, Catholics who have questioned the

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19 David Brooks, The Road to Character, 90.
20 William Miller, Dorothy Day: A Biography, 339.
morality of the capitalist economic model have been subjected to accusations of Marxist/Socialist tendencies and Dorothy was no exception.21

Dorothy was happy to protest alongside the Communists whom she said showed a greater level of sacrifice than many Christians for the poor.

I can say with warmth that I loved the Communists I worked with and learned much from them. They helped me to find God in His poor, in His abandoned ones, as I had not found Him in Christian churches … My radical associates were the ones who were in the forefront of the struggle for a better social order where there would not be so many poor.22

In response to an article in the Catholic Worker that challenged the anti-Semitic tone of a popular radio show hosted by a Father Charles Coughlan a reader commented: “I think you are a dirty Communist parading as a loyal Catholic … a two faced hypocrite, a wolf in sheep’s clothing, serving your red master, Joseph Stalin, who guides you from his capital in Moscow.”23 After the 1959 Cuban revolution the Catholic Worker invited further criticism by arguing that as the Catholic Church in Latin America was aligned with the rich and powerful, the poor of Cuba might be better off under Castro.24

Prior to 1960 there were only two social encyclicals that had been published. Rerum Novarum (1891) and Quadregesimo Anno (1931), both encyclicals protested the philosophies of Marxist-Socialism and Unbridled Capitalism, and both upheld the principle of the common good, the rights of workers and the right to private property. These aspects of CST were essential principles of the CWM. Earlier in this thesis I spoke of the Vatican’s

21 The 1984 Vatican Document Instruction on Certain Aspects of the Theology of Liberation specifically highlights the Church’s concerns regarding the perceived influence of Marxist ideology on liberation theology (see pages 73-74). Pope Benedict XVI also spoke of the liberation theology’s disruptive influence and its ties to Marxism (see pages 120-121). Pope Francis has come under similar attack from the neoliberal and neconservative movement in the United States.
23 William Miller, Dorothy Day: A Biography, 149-150.
24 Thomas Bokenkotter, Church and Revolution, 430.
disappointment at the lack of knowledge within the Catholic Church of its CST\textsuperscript{25} but this seems to have a historical precedent. While CST assisted Dorothy and the CWM in their mission, there is evidence to suggest that it was also a defence against opposition from the Church’s hierarchy. In 1949 Dorothy and the politically conservative Cardinal Spellman of New York clashed over a grave-diggers strike. The Catholic Chancery ordered her to remove the word Catholic from the \textit{Catholic Worker}. Dorothy refused and reminded the Cardinal that the Church had blessed neither capitalism nor communism and that the \textit{Catholic Worker} newspaper was in line with CST.

Dorothy acknowledged that the position of the CWM differed from that of the majority of Catholics who were content with offering charity while maintaining the status quo. Dorothy reminded the Catholic population that the CWM was simply instituting the Church’s CST: “Our insistence on worker-ownership, on the right to private property, on the need to de-proletarize the worker, all points which had been emphasized by the Popes in their social encyclicals, made many Catholics think we were Communists in disguise, wolves in sheep’s clothing.”\textsuperscript{26} By relying on the Church’s documented teaching, Dorothy gave universal validity to her more specific social action. Dorothy was a living embodiment of CST but it was clear that this faithfulness to the teaching did not necessarily endear her to all in the Church.

The CWM was immersed in historical reality and Dorothy admitted that the title of their journal \textit{The Catholic Worker} was meant to influence new thinking within the Catholic population. Dorothy intimates that among the wealthier Catholics there was complacency, and among the poorer Catholics elements of religious fatalism.

\textsuperscript{25} See Pontifical Council for Justice and Peace States: “This doctrinal patrimony is neither taught nor known sufficiently, which is part of the reason for its failure to be suitably reflected in concrete behaviour.” (\textit{Compendium} # 528)

\textsuperscript{26} William Miller, \textit{Dorothy Day: A Biography}, 188.
They were our own, and we reacted sharply to the accusation that when it came to private morality the Catholics shone but when it came to social and political morality, they were often conscienceless. Also Catholics were the poor, and most of them had little ambition or hope of bettering their condition to the extent of achieving ownership of home or business, or further education for their children. They accepted things as they were with humility and looked for a better life to come. They thought, in other words, that God meant it to be so.27

Dorothy’s radical approach moved well beyond charity as she was a paradigm of solidarity and protest on behalf of the poor before the writings of Gustavo Gutiérrez. She taught that it was not enough to be charitable toward the poor you needed to experience their life. “One must live with them; share with them their suffering too. Give up one’s privacy, and mental and spiritual comforts as well as physical.”28

Dorothy was also an advocate of the philosophy of personalism. In his book The Road to Character David Brooks describes Dorothy’s personalist approach:

Start your work from where you live, with the small concrete needs right around you. Help ease tension in your workplace. Help feed the person right in front of you. Personalism holds that we each have a deep personal obligation to live simply, to look after the needs of our brothers and sisters, and to share in the happiness and misery they are suffering. The personalist brings his (sic) whole person to serve another whole person. This can only be done by means of intimate small contact within small communities.29

Dorothy’s own journey of discovering a transcendent framework within the Catholic Church to help and direct her radical commitment to the poor meant she struggled to grasp the peace and antiwar movements sweeping America in the 1960s. While she had fought the bourgeois Church and understood the new movements’ cynicism toward it, she found their rejection of all authority disturbing. Despite her public differences with Church authorities,

28 Ibid., 214.
29 David Brooks, The Road to Character, 90.
the Church had been a vehicle for her protest, whereas this new breed of activists saw any authority as impinging on their freedom. Obedience to the Gospels, CST, dedicated commitment in humble service to the poor and self-sacrifice were the hallmarks of her life. The Catholic Church provided a structure that assisted and enabled these hallmarks. While peace rather than profit may have been the new activist’s goal, she saw a dangerous individualism that underpinned their idealism. “Day was truly countercultural. She stood against the values of the mainstream culture of the day with its commercialism and worship of success, but also against the sixties revolution of just “doing your own thing”. Both ultimately favoured an individual liberation that Day rejected.”

Dorothy’s dedication to the poor and oppressed was a lifelong commitment. Decades before the publication of Pope Francis’ *Evangelii Gaudium* she had become involved in “people’s daily lives and took on the smell of the sheep.” She was first imprisoned when a socialist due to her involvement in a 1917 suffragist protest and last imprisoned in 1973 protesting on behalf of farm workers. Whether defending the poor, the rights of workers, or promoting the peace movement, Dorothy was always willing to go to prison.

Dorothy Day had stood against injustice prior to her entry to the Catholic Church but it was Catholicism and her understanding of the Gospel’s special love for the poor that gave direction to the concrete action in which the whole CWM was engaged. Dorothy’s commitment challenged any element of “bourgeois Christianity” evident in the Church itself. Her spirituality of sacrifice, suffering and surrender led to the joy of the Gospel, not the despair of life. This is not a populist or momentary joy, it is the joy of knowing that

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30 Ibid., 103.
through your struggle to do God’s will you have come to an understanding of the truth, the truth of God.

Suffering presents the pleasurable sensation that one is getting closer to the truth. The pleasure in suffering is that you feel you are getting beneath the superficial and approaching the fundamental. It creates what modern psychologists call “depressive realism,” an ability to see things exactly the way they are. It shatters the comforting rationalizations and pat narratives we tell about ourselves as part of our way of simplifying ourselves for the world.  

Pope Francis’ exhortation *Evangelii Gaudium* would come to echo this same sense of joy. The exhortation translates as *The Joy of the Gospel*, but this joy requires a commitment and sacrifice toward others before the joy is understood. Pope Francis writes: “Whenever our interior life becomes caught up in its own interests and concerns, there is no longer room for others, no place for the poor.”  

To experience the joy of the Gospel requires us to make room for others, especially the poor. Dorothy made great sacrifices in order to make room for others, especially the poor. The joy of which Dorothy and Pope Francis speak of is related to service, especially to the most vulnerable. This is a joy that challenges individualism, consumerism and the anesthetization of society’s conscience. “For people in this striving culture, where everything is won by effort, exertion, and control, suffering teaches dependence. It teaches that life is unpredictable and that the meritocrat’s efforts at total control are an illusion.”

Dorothy’s radical socialist experience provided her with the opportunity to associate closely with poor migrant workers. It was these people that led her to an even more radical Christian experience; an experience that would become a lifelong mission. She walked with

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31 Ibid., 92.
33 David Brooks, *The Road to Character*, 94.
these people and followed them into their Church. Once there, it was her desire to obey the Gospels and CST. Her mission to minister to the fringes of society directed her to a greater fidelity to God, to the Church and to the poor.

Part Three: Dorothy Day’s Theological Framework

I can find no evidence of Dorothy Day making any statement regarding liberation theology, and while the biblical renewal and a greater commitment to the poor evident in the Church’s Second Vatican Council inspired her, other aspects of the Council left her lukewarm. Dorothy expressed contempt for “priests in T-shirts” and was ostensibly a woman of conservative theological and liturgical views. Dorothy herself wrote that she was not a theologian, that her mind was not abstract enough for that particular discipline. Her theological reticence may however have been coloured by the traditional outline in which theology had come to be understood in the Catholic Church. I would suggest that if Dorothy and the CWM had access to the historical-praxis method under which liberation theology was formulated, they may have been more closely aligned to a theological position than they thought. Dorothy Day’s mission may have incorporated a more personalist approach to the poor than Gutiérrez’s broader theological one, but both came to the

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34 In his theological appraisal of Dorothy Day and the Catholic Worker Movement, Lawrence Holben stated that Dorothy maintained a “staunchly orthodox Catholic stance in the face of pressure from both within and without the movement to adopt a less conservative theological position, especially in the tumultuous years following Vatican II. While she was enthusiastic about the post-conciliar Church’s renewed emphasis on scripture and its tentative steps toward a more prophetic stance on issues of war and peace, when it came to what some have called the “Protestantization” of Catholic liturgies, theology and mores, Day would have none of it. She was not a fan of priests in T-shirts and gaudy shorts. She was troubled by youthful Workers’ seemingly casual attitude about making their communions without confession.” All the Way to Heaven, (Eugene, Or: Wipf and Stock, 1997), 20).


36 When Gustavo Gutiérrez introduced liberation theology he was adamant that it was a new way of doing theology (see pages 42-44) and I believe it was elements in this method that Dorothy and the CWM practised.
conclusion that concrete action with, and on behalf of the poor was a Gospel imperative and a component of authentic discipleship.

Both the CWM and liberation theology sought to proclaim the Kingdom of God amidst the poverty and squalor of the world because this is what Jesus did. Both were committed to a theology, spirituality and mission that demanded solidarity with those whom they served. When describing the work of the CWM Lawrence Holben wrote: “For though we had food to give, we were serving people where they lived; we were coming to them rather than having them come to us, an approach that was fundamentally different from the approach of other service providers.”

This style of ministry was commensurate with the first step in Gutiérrez’s theological method which insisted on the theologian experiencing and engaging with the poor prior to articulating any theological position.

Lawrence Holben worked and lived with the Catholic Worker Community in Los Angeles from 1977 to 1981 and in 1997 published a book titled *All the Way to Heaven*. He wrote not only with the benefit of hindsight, but with theological methods unavailable to the early days of the CWM. Holben offered a theological framework for Dorothy Day and the CWM, and this framework contained many elements of a praxis-theological approach. In the first chapter titled *An Audacious Vision of Love* he provided six assumptions that set out theological criteria which explained how Dorothy Day and the CWM proclaimed the Kingdom of God and understood discipleship. Each of these assumptions built upon the prior assumption culminating in a theological framework. All of the assumptions contain elements which liberation theology and more specifically Gustavo Gutiérrez would regard as

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37 Lawrence Holben, *All the Way to Heaven* (OR: Wipf & Stock, 1997), ii.
significant in reaching the conclusion that discipleship demands we make a preferential option for the poor.

**First Assumption: “God is love.”**

God is love is a foundational belief of Christianity. We define this love as eternal, unconditional and immeasurable. It is however a love we can experience in history. This assumption does not say that God loves, as if God has a choice not to love, the assumption states that God can do nothing but love. This love is an active love that permeates creation; a creation that bursts forth from God who is love. This is a self-emptying love; the Creator’s sole purpose is to pour out that love on all creation.

God being God is a love that is enfleshed and enacted perfectly in the self-emptying that wedded the uncreated Word with human flesh in the person of Jesus and sent Jesus on the hard road from Nazareth to the cross. Such self-emptying love, the Christian proclaims in joy and awe, is the fundamental fact of the universe. It is our source and it will be our destiny, and not ours only but the whole of creation’s.  

God is love is an ontological description. Once this assumption is accepted it leads to further assumptions which gave direction and purpose to the CWM. While by definition this love is for all, the incarnation displays a special love for the poor and both the CWM and liberation theology based their discipleship upon this belief. God’s special love for the poor, through the person of Jesus was a manifestation of God’s divine love, prior to it being the ethical actions of disciples.

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38 Lawrence Holben, *All the Way to Heaven*, 5.
39 Ibid., 5.
Second Assumption: “Every human person is, in and of him or herself, the whole, total, and complete focus of the self-emptying love that burns at the heart of God.”

The second assumption is a logical consequence of the first. Because God is love and God pours forth that love on all creation, all creation has intrinsic value. Therefore, no one person can be counted as unnecessary or expendable. As a disciple of Jesus Christ, Dorothy Day went to the margins of society, but these margins were created by a society that viewed human beings as unnecessary or expendable; in other words a society that was acting contrary to the God of love. Dorothy and the CWM moved toward the margins of society in an attempt to show these people that God and the Church really cared about them. Their discipleship was not only about communicating their love but to bear witness to God’s love.

Gutiérrez described material poverty as a subhuman situation which denied people their personhood. He spoke in collective rather than individual terms.

The neighbour is not only a person viewed individually. The term refers also to a person considered in the fabric of social relationships, to a person situated in economic, social, cultural, and racial coordinates. It likewise refers to the exploited class, the dominated people, and the marginalised. The masses are also our neighbour.

It is important to note that Dorothy displayed a commitment to the masses during her time as a socialist but also recognised that it was the masses (Catholic migrants) who escorted her into the church. Like Gutiérrez she certainly understood that the masses are our neighbour.

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40 Ibid., 6.
41 Gutiérrez, A Theology of Liberation, 164.
42 Ibid., 116.
Third Assumption: “Every person is an image of God.”\(^{43}\)

This assumption is again a logical consequence of the first two assumptions but the depth of this statement cannot be underestimated. Holben explains:

If we accept these first three assumptions as true, how can we feel anything but moral horror and anguish not only at the limiting, dehumanizing suffering of the poor, which blunts and stunts their full development into all they were created by God to be, but also at the soul death of society’s “successes,” the rich and powerful, cut off from their own full humanity in different but equally deadly ways by the seduction of privilege and the addicting stupefaction of material excess?\(^{44}\)

The Medellin document on Peace described poverty in Latin America as “the most devastating and humiliating kind of scourge,”\(^{45}\) and at the Puebla Conference it was called “anti-evangelical.”\(^{46}\) Both describe a situation that is in opposition to the Kingdom of God and one which ultimately denies that all people are made in the image of God. In order for society to provide an opportunity for people to become what God created them to be, and to overcome this anti-kingdom scourge, a discipleship imperative would be to take an option for the poor. When assuming that all people are loved by God and made in God’s image, we are compelled to bring Matthew’s parable of the Last Judgement (Matt. 25: 31-46) into existential history.

Fourth Assumption: “Every human being has a call.”\(^{47}\)

God’s self-emptying love poured into the hearts of all people is a love that calls us all into living and sharing that same love; in biblical terms this call is primarily to love God and love our neighbour. All people are loved, and all people have a role to play in God’s loving purpose for creation. This vocational purpose is lived out in history. It is a call that is lived by

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\(^{43}\) Lawrence Holben, *All the Way to Heaven*, 6.

\(^{44}\) Ibid., 8.

\(^{45}\) Medellin Documents: Peace, # 29.

\(^{46}\) Puebla, # 1159.

\(^{47}\) Lawrence Holben, *All the Way to Heaven*, 9.
each person in their particular existential reality. By the conclusion of this fourth assumption we have a theological framework for discipleship which emphasises that God is love, that all people are loved by God, that all people have intrinsic value and finally that all people have a purpose which will somehow reflect God’s self-emptying love for all creation.

Poverty is but one interruption to this theological process of love, but it remains the world’s largest scourge. The preferential option for the poor is a teaching that reverses the lack of love that is afforded the poor. Dorothy Day and the CWM lived in solidarity with the poor and sought to provide them with an opportunity for community. Liberation theology also promoted solidarity with the poor but sought to give them a voice in society and the Church. It is this respect for their voice which started the process of re-discovering their dignity and “reinstates” their responsibility to participate in God’s creative love.

The Fifth Assumption: “A vital part of our imaging of God the Creator, an essential component of the call that is ours as human beings, is to be co-creators with God, vicars and stewards for God of the lavish generosity of God’s creation.”

When describing that we are made in the image of God we are not talking about a physical likeness but a likeness of the love that is the underlying principle of the universe. The incarnation is the historical manifestation of this love and when we follow Jesus we come to understand that disciples (followers of Jesus Christ) have a role to play in God’s creative purpose. The authentic love between man and woman that brings children into the world is a co-creative act because it is a self-emptying love; love for each other and love for the child that is to be born. People need to be liberated from whatever blocks their capacity to be co-creators. Poverty and oppression are blocks to people’s full development and those that

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Ibid., 9.
create the blocks are failing in their task as co-creators, no matter how successful the world judges them to be.

Dorothy Day and the CWM understood their work in terms of discipleship and were therefore acting as co-creators. Through service and community they offered dignity and value to people’s lives. Gutiérrez and liberation theology did the same but tended to focus on the structures that caused the blocks and the capacity for the victims themselves to overcome this situation.

As our particular talents and gifts differ, so the specifics of how each individually plays our part in this process of ongoing co-creation will differ. But we are less than fully human if we fail to play that part, and if the “system” somehow blocks the ability of anyone to discover, enact and celebrate his or her particular contribution to that process, then something is fundamentally wrong with the system.49

Dorothy and Gutiérrez, the CWM and liberation theology understood that there were aspects of their respective societies that prevented people from being co-creators, and that the systems evident in those societies were in themselves anti-co-creative. It was the poor who were the most common victims and although they may have differed in their method of response, both believed that an option for those poor was vital if God’s loving plan was to be established.

The Sixth Assumption: “The ideal society, the best structure for relationships between people, is one that clearly acknowledges the first five assumptions, seeks to embody their truth in all its systems, and is designed to enable all its members to live them out.”50

The magnitude of poverty throughout the world is evidence that neither the abovementioned theological framework proffered by Holben or Gutiérrez’s liberation theology has taken root in our world, or in the Church for that matter. The world of the poor

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49 Ibid., 10.
50 Ibid., 10.
is not just a political or economic concern. For the Christian it is fundamentally understood as a distortion of God’s plan for humanity. Liberation theologians refer to poverty in the world as anti-evangelical or anti-kingdom; Holben calls it a “blasphemous counterfeit of the Kingdom of God.”

The way of the disciple is to follow Jesus and Jesus begins his mission by addressing the poor, by placing them at the centre of history, rather than at its periphery. Dorothy Day and the CWM, Gustavo Gutiérrez and liberation theology sought to do the same. Their option for the poor was an act of discipleship and a desire to build the Kingdom of God. Although they operated in different places and utilised different methods, both understood the theocentric and discipleship nature of their option.

This theological framework offered to describe the mission of Dorothy and the CWM is written from a retrospective position. Despite Dorothy Day’s lack of theological credentials, I believe she fitted comfortably into Gutiérrez’s first step of a theological method that focussed on solidarity and then transitioned to praxis. Dorothy wrote: “I never liked the appeal to enlightened self-intent. I wanted to love my fellows; I loved the poor with compassion. I could not be happy unless I shared poverty, lived as they did, and suffered as they did.” This statement, I believe, is more theological, than ethical or spiritual; it is a praxis-theological position inspired by a love for God and a love for neighbour.

For liberation theology the importance of the teaching on the preferential option for the poor being a theocentric option cannot be understated. Dorothy Day and the CWM understood the biblical foundations of the teaching and the necessity of concrete practice if one was to be an authentic disciple but they were guided by the ethical values of CST and

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51 Ibid., 11.
52 Ibid., 28.
the philosophy of personalism; they were looking at the conversion of people rather than a conversion of the entire Church. This is in no way a condemnation of the CWM or Dorothy Day but an observation that their historical context lacked an effective theological framework to assist in their mission.

Liberation theology’s praxis methodology, a praxis understood in the light of the Gospel, contained a vision of empowerment that sought to educate people so that they could be liberated from their place of injustice and poverty. Liberation theology encouraged the poor to take an active role in the transformation of the political, cultural and economic structures of society. The poor were also to become the major contributors for change in the Church itself. Dorothy and the Catholic Workers didn’t necessarily focus on the empowerment of the poor, or their capacity to enact change. They adopted a more ethical approach that provided service and community for the broken and the vulnerable. While they sought change in society, the church structures as they understood them were never a priority.

In her autobiography she wrote that prior to her conversion to Catholicism she believed that it was the non-Christians that were trying to enact change:

Jesus said, “Blessed are the meek,” but I could not be meek at the thought of injustice. I wanted a Lord who would scourge the money-changers out of the temple, and I wanted to help all those who raised their hand against oppression. For me Christ no longer walked the streets of this world. He was two thousand years dead and new prophets had risen up in His place. I was in love now with the masses.53

Dorothy would remain in love with the masses but her conversion to Catholicism deepened her commitment and solidarity with them. Dorothy began a movement whose protest would metaphorically “overturn the money tables,” of society. The impact of her mission

and the *Catholic Worker* paper cannot be underestimated as it even attracted the attention of the Federal Bureau of Investigation, whose leader J. Edgar Hoover wanted the federal government to prosecute the movement for sedition.\(^{54}\)

While Dorothy’s life was a protest against how society created and sustained marginalism, she attempted to meet the immediate need of society’s most vulnerable and provide them with a sense of community. In doing so she afforded them dignity. Gutiérrez also set about to show the poor that God and those who professed God loved them. He would focus on education, on the capacity for the poor to be agents of their own change in the process of their liberation and this approach also sought to give them a sense of dignity and purpose.

### Part Four: Dorothy Day and Gustavo Gutiérrez’s Threefold Definition of Poverty

Dorothy Day wrote books on spirituality and was instrumental in the social action agenda of the CWM. But in relation to her response to poverty I believe her life prefaced Gutiérrez’s threefold definition of poverty, and that this exemplified her practicing the preferential option for the poor. The first component of Gutiérrez’s definition was to declare that poverty was a scandalous condition; the second was a renewed understanding of spiritual poverty; third was the need to be in solidarity with the poor and to protest on their behalf.\(^{55}\)

1. **Poverty as a Scandalous Condition:** When speaking of poverty as a scandalous condition Gutiérrez is indicating that it is a man-made and unnecessary situation. In theological terms he described this scandal as anti-evangelical and in ethical terms it was the cause of

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\(^{54}\) Thomas Bonkotter, *Church and Revolution*, 436.

\(^{55}\) See pages 46-47 for a fuller description of Gutiérrez’s definition of poverty.
premature death. This scandalous situation was in direct opposition to the “God of Life.” Therefore those seeking to overcome poverty must begin by recognising this existential reality. Dorothy had begun to investigate and to understand the scandal of poverty prior to her entry into the Catholic Church. Her time as a journalist reporting on labour unrest and the plight of poor workers was a solid foundation for her transition to the CWM. The Catholic Worker newspaper was not a publication calling for an increase in charity to the poor; it was reporting on an economic system and a society that was contributing to the “scandal.”

The poor and the workers whom she saw living in squalor were not, she felt, a shiftless lot deserving of their fate, as the smug middle-class morality would have it. They were victims of a heartless society. She sensed that “from then on my life was to be linked to theirs.” To identify with the oppressed she deliberately sought out jobs that demanded hard physical labour and taxed her to the limit while she pursued a college education.\^{56}

In keeping with the basic tenets of CST, Dorothy sought the protection of all workers, no matter their colour or creed. She was vocally disappointed with the lack of leadership within the Catholic Church in relation to the plight of the poor and the workers in the USA. While perhaps lacking some of the more emphatic terms utilised by Gutiérrez, I believe Dorothy and the CWM denounced the situation of workers and the poor in the USA as scandalous.

2. Spiritual Poverty: Gutiérrez spoke of spiritual poverty as a precondition for receiving and then acting on the Word of God. Rather than detaching us from the world, this spirituality would manifest itself in concrete action and a deepening awareness of the suffering of the poor. Dorothy’s mission had strong links to social justice but its foundation was spiritual. Her life was counter-cultural because it was deliberately detached from a world that contributed

\^{56} Thomas Bonkotter, *Church and Revolution*, 405.
to and maintained poverty. Spiritual words such as surrender and sacrifice were at the heart of her mission and directed her to the very heart of material poverty in America. In a traditional understanding of spiritual poverty the task is to master one’s desires but Dorothy understood this in terms of service. The mastering of her own desires (sacrifice) enabled her to serve and in that service she came closer to the poor and to God.

Dorothy’s writings displayed clarity of thought in regard to spiritual poverty and its immersion in the world rather than its separation. Dorothy’s whole mission was a theocentric option because it was directed by God and led to God. “Because I sincerely loved his poor, he taught me to know him. And when I think of the little I ever did, I am filled with hope and love for all those others devoted to the cause of social justice.”57 While Dorothy did not necessarily understand, as Gutiérrez did, the power of the poor as agents of change in society and the Church, she recognised the power of poverty in a spiritual sense.

We have the greatest weapons in the world; greater than any hydrogen or atom bomb, and they are the weapons of poverty and prayer, fasting and alms, the reckless spending of ourselves in God’s service and for his poor. Without poverty we will not have learned love, and love, at the end, is the measure by which we shall be judged.58

It is important to note that Dorothy’s journey to Catholicism did not begin with an individual spiritual experience, but with her observations of the faith of Catholic migrants and the birth of her daughter Tamara. Dorothy believed it was the will of God that she serves the poor and in Gutiérrez’s definition of spiritual poverty one must begin by listening and then acting on the Word of God.

58 Ibid., 69.
Community was also a vital spiritual and practical component of Dorothy’s life. “The only answer in this life, to the loneliness we are all bound to feel, is community. The living together, working together, sharing together, loving God and loving our brother, and living close to him in community so we can show our love for Him.” Dorothy’s spiritual journey led her out of herself and then into the world of the poor, and with their companionship she was led to God.

3. Poverty as a Commitment of Solidarity and Protest: Dorothy believed in the importance of community and she created hospitality houses that provided the most vulnerable an opportunity to live in community. Solidarity was lived by creating community, and community assisted people in overcoming loneliness. The CWM survived on haphazard charity, but Dorothy welcomed this uncertainty as it created a vulnerability that the poor experienced every day. “There is never anything left over, and we always have a few debts to keep us worrying, it makes us more like the very poor we are trying to help.”

The whole CWM could be considered a protest. In its attempt to highlight the root of social ills and its inhumanity, it constantly challenged a status quo that oppressed workers and created inequality rather than solidarity between peoples. Dorothy’s commitment to protest saw her imprisoned many times. Dorothy protested on behalf of the poor and the workers but she also defended the communists who were victimised stating that “A Communist beaten and kicked reminds us of Jesus as He fell beneath the weight of the cross.”

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Part Five: Church Worship and Social Justice

In Chapter Two of this thesis I outlined the Sacred Congregation for the Doctrine of the Faith (SCDF) objections to liberation theology in its 1984 publication *Instruction on Certain Aspects of the Theology of Liberation*. Among those objections was the SCDF’s claim that liberation misrepresented sacramentality and denied the unity contained within the Eucharist. It is my belief that this was a false objection, one that misrepresented liberation theology and failed to grasp the correlation between Church worship and social justice.62 Dorothy Day and the CWM had sought to connect the primary traditional spiritual practises of the Catholic Church with social justice decades before the formulation of liberation theology. Her commitment to the Mass, prayer, fasting and confession deepened her faith and strengthened her commitment to the poor. In later years she would come to use prayer and fasting as methods of protest and solidarity.

The prayer life of the CWM was a vital cog in their pursuit of community, and prayerfulness permeated the concrete reality of their mission:

> There is no point in trying to make us into something we are not. We are not another community fund group, anxious to help people with some bread and butter and a cup of coffee or tea. We feed the hungry, yes; we try to shelter the homeless and give them clothes, if we have some, but there is a strong faith at work; we pray. If an outsider who comes to visit doesn’t pay attention to our praying and what that means, then he’ll miss the whole point of things.63

While Dorothy Day and the CWM set about feeding the hungry, welcoming the stranger, caring for the sick and visiting prisoners they were clear in their understanding of the connection between their ministry and the sacramental and liturgical practices of the

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62 See pages 74-76.
63 Ibid., 51.
Church. Dorothy wrote: “Without the sacraments of the Church, primarily the Eucharist, the Lord’s Supper as it is sometimes called, I certainly do not think that I could go on.” While this particular quote may highlight the personal power Dorothy derived from the Eucharist, she was adamant that there was a connection between liturgy and social action: “We have been trying from the start to link up the liturgy with the Church’s social doctrine, realizing that the doctrine of the Mystical Body of Christ is at the root of both.” Dorothy Day believed in the formational capacity of the Eucharist and she melded the Eucharistic meal with community and mission stating that:

We cannot love God unless we love each other, and to love we must know each other. We know Him in the breaking of bread, and we know each other in the breaking of bread, and we are not alone anymore. Heaven is a banquet and life is a banquet, too, even with a crust, where there is companionship.

If social justice was to be central to the Church’s mission then it would seem prudent to see it play a more prominent role in the liturgy. Liberation theologians and others seeking liturgical reform believed that the liturgy was a celebration of God’s divine justice. Mark Searle explains: “The liturgy celebrates the justice of God himself, as revealed by him in history, recorded in the Scriptures, and proclaimed in the assembly of the faithful. It is with this justice that liturgy is concerned.”

For Dorothy Day and liberation theologians the liturgy was central to their mission and formation as disciples. If social justice, and this includes the preferential option for the poor, was to be part of the formation of all the faithful then the liturgy provided an ideal

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66 Ibid., 98-9.
opportunity for that formation. In short, the liturgy should be a place where disciples are formed.\textsuperscript{68}

Dorothy Day and many others in the Catholic Worker Communities began the day with the psalms (Church’s Office), daily Mass (when possible) and attended regular reconciliation. It was a rhythm that was harmonious with a life of voluntary poverty and charity towards the involuntary poor. “For Day, faith (and prayer) came first, which in turn led to an increase in knowledge and understanding. Her prayer was neither fuzzy nor ethereal, but concrete and sacramental.”\textsuperscript{69} In many respects, I would suggest, that similar to Gutiérrez and the Basic Ecclesial Communities, Dorothy bore witness to the fact that prayer and social action were intimately intertwined and that both informed and formed each other. In a unique example of how Dorothy intertwined liturgy and social action, she and her fellow protesters who were imprisoned in a “illegal protest,” celebrated their release with a Eucharist of thanksgiving.\textsuperscript{70}

Earlier in this chapter I wrote of the influence that the poor migrants had on Dorothy’s path to Catholicism and Dorothy also spoke of her need to love and praise God with others. These experiences are a reminder that for Dorothy Day the traditional practises of the Church were not privatised affairs. Like liberation theologians, there is a strong communal theme in her worship and in her mission.


\textsuperscript{70} Police arrested ninety-nine people, including Dorothy, thirty nuns and two priests who were picketing after a Californian judge had forbidden farmworker picket lines. They were imprisoned for two weeks. The Mass that was celebrated at their release was an example of how faith and political action worked in the Catholic Worker movement. (See Thomas Bokenkotter, \textit{Church and Revolution}, 449).
Part Six: Dorothy Day, the Catholic Worker Movement and Pacifism

One of the contentious issues that the Church faces in relation to its social justice mission is the potential of violence. The question of whether the Church could ever condone violent revolution is a complex one. One of the criticisms of early liberation theology was its utilisation of Marxist analysis and the danger of that analysis leading the Church into violent class warfare. On the other hand, given that poverty and oppression may lead to premature death, could a preferential option for the poor include a “defensive violence” that would protect and liberate the poor? In the 1967 social encyclical *Populorum Progressio*, Pope Paul VI intimates that the oppressed may indeed rise up to overcome their unjust position but he blames the potential of violence on the oppressors.⁷¹

The SCDF’s *Instruction on Certain Aspects of the Theology of Liberation* raised the question of the potential of violence contained within liberation theology’s association with Marxist philosophy. To this question I have argued that liberation theology has failed to offer an effective answer.⁷² Even in the new *Introduction* of the 1988 anniversary edition of Gutiérrez’s *A Theology of Liberation*, there is no further development of his position in regard to the potential of violent revolution. Given the lack of dialogue on the matter of violence from liberation theology and the Church it might be reasonable to suggest that violence is a possibility but that it is the very last and least favoured position.

For Dorothy Day and the CWM there was no complex issue to deal with. Pacifism was their stance and they continued to exhibit a preferential option for the poor from this position. Dorothy attended protests and rallies in which the communists were involved. But her

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⁷¹ Pope Paul VI, *Populorum Progressio* # 49 states: “Continuing avarice on their part will arouse the judgement of God and the wrath of the poor, with consequences no-one can foresee.”

⁷² See pages 76-78.
faithfulness to the traditional practises of the Catholic Church and her pacifism were far removed from the communist agenda.

I did not look upon class war as something to be stirred up, as the Marxist did. I did not want to increase what was already there but to mitigate it. When we were invited to help during a strike, we went to perform the works of mercy, which include not only feeding the hungry, visiting the imprisoned, but enlightening the ignorant and rebuking the unjust.  

Dorothy and the CWM remained neutral during the Spanish Civil War (1936-1939) because it could not support atheistic communism or fascist Catholicism. Even after the bombing of Pearl Harbour (07-12-1941) it maintained its pacifist stance and as a consequence its support dwindled. It also opposed the Vietnam War (1955-1975) and in each of these cases found itself on the opposite side of the majority of the Catholic hierarchy. “In relation to the antiwar movement Dorothy saw it as a wakeup call for the Church, whose alliance with the state – along with its failings on other social issues – scandalized so many.”

In an interesting and challenging twist to those who would advocate the preferential option for the poor, Dorothy raises the question of whether pacifism is in fact, an act of solidarity with the poor. “When we are being called appeasers, defeatists, we are being deprived of our dearest goods, our reputations, honour, the esteem of men, and we are truly on the way to becoming the despised of the earth. We are beginning perhaps to be truly poor.”

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74 Thomas Bokenkotter, *Church and Revolution*, 443.
Part Seven: Conclusion

Dorothy Day successfully interwove spiritual and social action in a manner that few in the history of the Church have been able to achieve. When Notre Dame University bestowed the Laetere Medal on Dorothy, she was described as one “who comforted the afflicted and afflicted the comfortable.” A crucial element in understanding Dorothy’s commitment to the poor and needy is that she regarded herself as the “comfortable,” and that her spirituality and understanding of the Gospel demanded that she comfort the afflicted. What is unclear is whether Dorothy regarded the Church as among the “comfortable,” but I am going to suggest that she did. This was the position taken by Gutiérrez, and although Dorothy does not articulate this position as strongly as he did, her life and clashes with bishops suggests it probably was.77

Catholic Social Teaching and the philosophy of personalism contributed to Dorothy’s mission and ministry. But it was her faith, imbued by the Gospels preference for the poor that led her to a firm belief in a spirituality that required sacrifice, suffering and self-surrender. This was not an easy position but for Dorothy it represented her faithful solidarity to the Jesus of the Gospels and to the poor. Her response to this spiritually inspired commitment was concretised within the framework of the CWM. This praxis-theological position was one she shared with the liberation theologians who came later and whose spirituality and mission also led them to live and practise a preferential option for the poor.

76 The Laetere Medal is an annual award given by the University of Notre Dame in recognition of outstanding service to the Catholic Church and to the wider society.

77 Dorothy did engage in some criticism of the Church. In The Long Loneliness she wrote: “I loved the Church for Christ made visible. Not for itself, because it was so often a scandal to me. Romano Guardini said that the Church is the Cross on which Christ was crucified; one could not separate Christ from His Cross, and one must live in a state of permanent dissatisfaction with the Church.” (149-150)
Dorothy knew and understood that faith was a gift from God. But like Gutiérrez and the method associated with his theology, it was the practise of that faith which led to a deeper awareness and understanding of God and mission. The opposition to Dorothy and the CWM came in many forms, from both inside and outside the Church. But their consistency and commitment, sacrifice and solidarity were a concrete witness of the Gospel and its preferential option for the poor.

We know how powerless we are, all of us, against the power of wealth and government and industry and science. The powers of this world are overwhelming. Yet it is hoping against hope and believing, in spite of “unbelief,” crying by prayer and by sacrifice, daily, small, constant sacrificing of one’s own comfort and cravings – these are the things that count.\(^78\)

In September 2015 Pope Francis spoke to the American Congress and mentioned four great Americans: Abraham Lincoln, Reverend Martin Luther King Jnr, Thomas Merton and Dorothy Day. In relation to Dorothy Day the Pope said: “In these times when social concerns are so important, I cannot fail to mention the servant of God Dorothy Day, who founded the Catholic Worker Movement. Her social activism, her passion for justice and for the cause of the oppressed was inspired by the Gospel, her faith and the example of the saints.”\(^79\)

Summary and Transition

In Chapter Three of this thesis I stated that Christian personalism was not a deterrent to individuals making a preferential option for the poor and Dorothy Day is a clear example of this.\(^80\) Although this is a philosophy that begins with a call for individual responsibility, it is, in its Christian form, aimed toward the common good. Dorothy and the CWM practised a

\(^78\) Ibid., 16.
\(^79\) https://www.latimes.com/nation/la-na-pope-visit-four-americans-20150924-htmlstory.html
\(^80\) See page 111.
style of Christian personalism that journeyed into the heart of wounded society. Although they protested against a society that created marginalised people, they didn't investigate the capacity of the poor to be agents of their own change or the need for the Church to undergo its own reformation in order to be in greater solidarity with the poor. This is not a condemnation of personalism, but rather, recognition that the liberation theology’s approach to poverty contained a wider brief. I believe it has a greater potential for the teaching on the preferential option for the poor to enter more deeply into the heart of Church practice.

When I speak of entering the heart of Church practice, I mean empowering the people of God to find their voice and re-shape that heart. Dorothy Day and the CWM went to the peripheries, but their mission could have also been regarded as “peripheral.” Herein lays the problem that liberation theology, and now Pope Francis, is seeking to overcome. My admiration for Dorothy and the CWM is clear but unless the poor begin to transform the heart of the Church, they, and all those who practise the preferential option for the poor will remain on the periphery. Gutiérrez and liberation theologians wanted a change in the heart of the Church; both its institution and its people. For Gutiérrez the preferential option for the poor was meant to impact the Church to the point that the poor became integral to the Church’s identity. The poor were to be a powerful voice within the Church. For the CWM the poor were integral to their identity as disciples and as a Catholic apostolic community. I do not believe that Dorothy advocated that the poor would be responsible for the transformation of the Church, though others in the CWM may have since come to that conclusion.
CST played a role in the philosophy of the CWM and provided the movement with a clear historical awareness. In the late 1930s Dorothy wrote:

This month I’ve been reading the Encyclicals of the Holy Father as I’ve gone about town on the subway and the elevated. They are the best kind of spiritual reading because they are directed to us now, at the present time, for our present needs… They are pertinent, deep and searching in their analysis of the present day and our conduct at this time.⁸¹

Given the historical context I can assume that Dorothy was speaking about *Rerum Novarum* and *Quadragesimo Anno*. Holben states that the CWM continued to draw great encouragement from the Church’s increasing output of social documents:

The movement could only be encouraged by developments like Paul VI’s apostolic letter on social justice (issued in 1971 to mark *Rerum Novarum*’s eightieth anniversary), the judgement of the Latin American bishops assembled at Puebla that authentic Christianity presumes a “preferential option” for the poor, and the repeated exhortations by John Paul II regarding the Church’s negative judgement of collectivist communism and materialistic capitalism alike.⁸²

Dorothy Day and Gustavo Gutiérrez were both influenced by CST. But that does not offer any insights into what Dorothy thought about liberation theology. Therefore, it would be speculative to comment on her opinion of Gutiérrez or liberation theology. What is clear is their shared love for, and commitment to, the poor.

The Houses of Hospitality begun by Dorothy Day and Peter Maurin brought people into one’s home and this closeness differed significantly from a majority of charities that operated at arm’s length. These houses were a unique aspect of the CWM but they were also a clear example of the solidarity of which Gutiérrez and liberation theologians spoke. This is a solidarity that builds relationships and is governed not by a preconceived and

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⁸¹ Cited in *All the Way to Heaven*, Lawrence Holben, (Eugene, OR: Wipf and Stock, 1997), 81.
⁸² Lawrence Holben, *All the Way to Heaven*, 82.
carefully calculated process, but by the praxis of relationships. It is in the living together that people begin to understand the demands of community and an understanding of the ministry of Christian hospitality.

Despite Dorothy’s theological and ecclesial conservatism, the CWM has, in the course of its own history, found much greater support from the progressive side of Catholicism than it has from the more conservative elements of the Church. Dorothy and the CWM, Gutiérrez and liberation theology were both capable of deriving inspiration from Popes John XXIII and John Paul II. They all rejected the neoliberal form of economics so favoured by the neoconservatives, which despite their “creation wealth,” rhetoric does not make a preferential option for the poor.

Gutiérrez was far more direct in his call for ecclesial change and encouraged the Church to move toward a greater consciousness and inclusiveness of the poor than did Dorothy. My own contention is that Dorothy would have felt “comfortable,” in the more authoritarian, traditional, and personalist Church promulgated by Pope John Paul II. That said it was society rather than Church’s hierarchy that she wished to challenge. Her critique of modern western democratic capitalism saw her closely aligned with liberation theologians and more specifically with the poor.

Despite my admiration for Dorothy Day, it remains my argument that Gutiérrez and liberation theology provided a more effective framework for an understanding and application of the preferential option for the poor. It is their methodology that seeks to transform the Church’s ecclesial identity. Thus far it has failed in this somewhat ambitious ideal. But if the preferential option for the poor is not integral to the mission and identity of
the Church, it will be left to remarkable people such as Dorothy Day to remind us of its centrality to true discipleship.

The primary purpose of this chapter was to demonstrate that one does not need to be a liberation theologian to be a practitioner of the teaching of the preferential option for the poor. This demonstration does however cast doubt on the methodology of people such as Dorothy Day to effectively assist in the widespread understanding and application of the teaching. Two areas of potential that could be more fully explored by the Church is Dorothy’s clear promotion of the relationship between Church liturgy and social justice. If the teaching on the preferential option for the poor could be more closely aligned with the Eucharistic celebration, it could assist in the teachings dissemination. The other area is the relationship of the preferential option for the poor and pacifism.

Pope Francis was elected Pope in 2013. He is not a liberation theologian but he has indicated that he would like the Church to be a Church of the poor. The rhetoric may be promising but to what end will he promote the preferential option for the poor. I have already stressed that occasional references in papal documents and appeals to personal conscience are not enough. What theology and what ecclesiology will Pope Francis introduce that ensures that the teaching on the preferential option for the poor enters the everyday discussions of universal Catholic communities? What sort of ecclesial renewal will this “Church of the Poor” entail and will it have the capacity to awaken the teaching from its slumber? What does he have to say about the definition of the Church as the People of God, about collegiality and a hierarchy willing to listen to its people? All of these questions will be asked in relation to their impact on the revival of the teaching of the preferential option for the poor.
The following chapter will focus on the renewal of the Catholic Church that has been promulgated by Pope Francis. This renewal comes under the Pope’s broader vision of reforming the Church into a “Church of the Poor” and includes a revitalisation of the teaching of the preferential option for the poor. The chapter will explore the new ideas and methods that the Pope is introducing to insert the teaching into the heart of the Church’s identity and mission.
Chapter Five
Pope Francis and the Church of the Poor

The election of Pope Francis in March 2013 has seen the teaching on the preferential option for the poor receive a highly visible, renewed thrust in both the Church and wider society. This renewal is not only the result of a greater focus on the teaching, but concomitant of a much broader vision of how the Pope wishes to renew and form the identity of the Church as a “Church of the Poor.”

The concept of a “Church of the Poor,” first mooted by Pope John XXIII in 1962, was seriously investigated at the CELAM Conference at Medellin and in Gustavo Gutiérrez’s A Theology of Liberation. The subsequent critique of Latin American liberation theology by the Sacred Congregation for the Doctrine of the Faith (SCDF) in its 1984 document Instructions on Certain Aspects of the Theology of Liberation curtailed not only liberation theology, but also stifled any effective developments in relation to what a “Church of the Poor” might entail. Pope Francis is addressing this failure by exploring and articulating what this definition of Church demands at a theological, ecclesial, spiritual and pastoral level.

This chapter will contain five parts. The first part will explore the historical factors that shaped and nurtured Pope Francis’ approach to the papacy. This exploration will reference his relationship with liberation theology and the preferential option for the poor prior to his election as pope. It will include his involvement with CELAM and summarise the major theological influences on his thinking. Part two will examine specifically what Pope Francis means when he speaks of a Church of the poor. Part three will investigate whether a Church
of the poor has the capacity to inform and transform the orthodoxy of the Church. Part four will look at how the reformation of the Church undertaken by Pope Francis’ has created conflicts and controversies both in the Church and the global community. Part five will examine evolving theological reflections on liberation theology and the preferential option for the poor in the writings of Gustavo Gutiérrez.

While the rhetoric that the Pope espouses displays a great deal of energy in relation to the promotion of the preferential option for the poor, a question of efficacy remains. Unique to liberation theology was the insistence on historical projects that literally translated into improved conditions for the poor. How Pope Francis translates his particular vision into historical projects remains an important question in relation to any progress for the teaching on the preferential option for the poor.

**Part I: The Historical Background of Pope Francis**

Pope Francis was born Jorge Mario Bergoglio in Argentina of Italian parentage on December 17th, 1936. He was ordained a priest in 1969, and took final vows in the Society of Jesus (Jesuits), in 1973. He became Provincial of the Jesuits the same year. In those early years he acted in a fairly conservative manner. In 1975, he became Rector of the Jesuit College Colegio Maximo, where he introduced a more traditional formation program for priests. Publications by Gustavo Gutiérrez, Leonardo Boff and Paolo Freire were not included in the students’ study programmes. At the conclusion of his appointments as Provincial and Rector, Bergoglio was moved to Germany for further studies. He left the Jesuits in Argentina

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1 Orthodoxy refers to a correct or acceptable interpretation of the faith, the opposite is heresy. Any Church renewal will require a re-examination of current orthodoxy and any proposal that calls for a shift/transformation of orthodoxy will be closely critiqued to ensure it avoids any tendency toward heresy.
divided. He was popular among conservatives and his students but out of sync with the more theologically and politically progressive Jesuit confreres who had opted to practise a concrete solidarity with the poor. This solidarity included protesting the economic and political oppression of the poor.

His early vowed religious life took place during a lamentable time in the history of Argentina. From 1973 through to 1983 was a period known as the “Dirty War” in which thousands were tortured and/or killed by branches of the Argentinian government and the military. Complicit in this war were some high-ranking Church officials as well as members of the Vatican, whose relationship with the American Central Intelligence Agency aided and abetted the Argentine military.

There has been speculation regarding Pope Francis’ role as Provincial of the Jesuits during the “Dirty War,” but ultimately there is no evidence of collusion with the military. There were two particular incidents related to this historical period that has clouded his otherwise solid record. The first of these was when as Archbishop/Cardinal of Buenos Aries (1998-2013) he failed to meet with the Plaza de Mayo (Mothers and Grand-Mothers of the disappeared). On becoming Pope, he did meet a representation of the group but thus far has not presented any information regarding the Church’s role in the disappearance of

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2 During Bergoglio’s time as Provincial and Rector, vocations to the Jesuits significantly increased. (See Austen Ivereigh, The Great Reformer (New York: Picador, 2014), 140.

3 Austen Ivereigh. “One wing of the clergy – the military-chaplain vicariate led by Bishop Tortolo, along with Bishop Bonamin and certain military chaplains, such as the sinister Cristian von Wernich, later indicted for murder and kidnapping – certainly saw the eradication of Medellín-type theology as part of a wider crusade against subversion, and were complicit.” (The Great Reformer, 153)

4 Earlier in this thesis, I wrote on the alliance between the CIA and the Vatican (see pages 63-64). The purpose of this alliance was to stop the spread of communism throughout Latin America and this goal included supporting Argentina’s military opposition to Marxist rebels. The extent of the Church’s support for a brutal regime has not yet been fully revealed but for those Catholics of a liberationist bent it led to Vatican assisted government oppression.
children. The second incident was his withdrawal of support for two Jesuits priests working in the slums that were kidnapped and tortured by the military junta.\footnote{Fathers Jalics and Yorio were two Jesuit priests working in the slums and fighting on behalf of the poor. They took a liberation theology approach, questioning the government’s policies which maintained the poverty of the people while simultaneously improving the lot of the rich and powerful. They were accused of being communists and threatened. As their Provincial Bergoglio asked that they leave their ministry but they refused. Bergoglio withdrew their capacity to practise their priesthood and inadvertently gave the military greater freedom to “intervene”. Although this was not Bergoglio’s intent it placed the priests in a precarious situation.}

**Archbishop Bergoglio, Liberation Theology, and the Preferential Option for the Poor**

In the 1970s the Jesuits embarked on a world-wide endeavour to seek radical ways of assisting the poor and began with a concerted effort to be in solidarity with them. Throughout Latin America, many Jesuits displayed a desire to embrace and practise the basic tenets of liberation theology, including its utilisation of the tools of Marxist analysis. This practice included living in base communities within the slums of Argentina. Bergoglio had supported the Medellín Conference and strongly endorsed the Puebla declaration on the preferential option for the poor. But like Pope John Paul II and Cardinal Ratzinger, he did not believe that theology could benefit from a Marxist hermeneutic. As Provincial of the Jesuits and Rector of the Jesuit College, Bergoglio strongly opposed any association with the theologies of liberation that displayed links with Marxist/Socialist ideology.\footnote{Archbishop Bergoglio was suspicious of a group called the “Third World Priests Movement”. This movement combined a socialist style promotion of governance and reform within the Catholic Church. They opposed the Church hierarchy’s alliance with the military and worked mainly in the slums.} He did encourage student priests to work in the slums and connect with the people, but the focus of this encouragement was on charity rather than on justice.

In 1992 Bergoglio was named as an auxiliary bishop in Buenos Aires and in 1998 became the archbishop. As Archbishop he created programs for seminarians that ensured that they
experienced and understood the poverty of people by engaging with them. His own simple lifestyle added credibility to his directive:

The option for the poor ran through his pastoral, educational, and political policies and was key in his own choices and witness. But it was also a priority in itself. It meant focussing resources and efforts in deprived areas. He would increase from eight to twenty six the number of slum priests and spend at least an afternoon a week in the villas.7

He also established soup kitchens and provided educative assistance for the poor but there was still limited analysis of social structures that perpetuated poverty. Many Jesuits regarded his approach as bourgeois. With a focus on charity rather than justice, his programs went ahead unabated as the military regime adjudged them to be of no threat to the government.

Another component of the Archbishop’s approach to the poor was recognition and encouragement of how the people expressed their faith. “It was an option for the poor expressed in manual labour, hands on pastoral care, and a deep respect for popular culture and values, especially a religiosity of pilgrimages, shrines and devotions. It was a radical inculturation into the lives of God’s holy faithful people.”8 The early liberation theologians had emphasised the evangelising power of the poor but they had tended to regard the traditional piety of the people as a stumbling block that blinded them to their existential reality; a “blindness” that led to religious fatalism and a passivity toward oppressive governments. Archbishop Bergoglio did not share their negative views on traditional piety. He appreciated their unique expressions of faith and believed that encouraging these specific religious practices was in fact a way of respecting their dignity and therefore reflected an option for the poor.

7 Austen Ivereigh, The Great Reformer, 246.
8 Ibid., 173.
Archbishop Bergoglio believed that the teaching on the preferential option for the poor had the capacity to assist the Church in overcoming spiritual worldliness and could therefore assist in reforming the Church: “The idea is that the Church is first among the poor and from there reaches out to everyone. It is the opposite of what in economics is called the trickle-down effect – only it never does trickle down. It’s not about the poor and only the poor. It’s from them, to the rest.”

Archbishop Bergoglio and CELAM

Earlier in this thesis I spoke of the tension in which the CELAM Conference at Puebla (1979) took place and these difficulties had burgeoned by the time of the 1992 Conference in Santo Domingo. Among the more significant problems was the question of collegiality. The Medellín Conference was an example of collegiality and representative of the style of papacy adopted by Popes John XXIII and Paul VI, but at the Santo Domingo Conference collegiality was quashed.

Santo Domingo was the fourth CELAM Conference, but even before it began Rome had rejected the working document and replaced eighteen of the twenty theological advisors. The “editing” of the working document and the rejection of the initially proposed theologians was representative of a papal style that valued centralisation of authority over collegiality.

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9 Ibid., 305.
10 See pages 56-61.
11 Collegiality refers to the relationship between the world’s Bishops and the Pope. The concept allows bishops a role in the governance of the Church. For Pope Francis it is a vital component of the mission and teaching of the Church.
The 2007 meeting in Aparecida in Brazil took place in an atmosphere of collegiality, with Archbishop Bergoglio playing a prominent role. As president of the commission he helped to set its agenda and was largely responsible for the writing of the final document.

This also explains the apparent paradox that Benedict XVI, who as Cardinal Ratzinger had provided the theological justification for Vatican centralism in the 1980s and 1990s, now allowed CELAM to prepare for the fifth Conference in complete freedom, without interference from Rome, yet with the support and blessing – just as had happened in Medellín at the time of Paul VI. The Peruvian theologian Gustavo Gutiérrez, pioneer of liberation theology, would later say that “Aparecida mostly happened thanks to Ratzinger.”

The meeting reintroduced the “See-Judge-Act” methodology but it was Bergoglio who insisted that the “seeing” be done through the eyes of faith rather than any other lens. It was at Aparecida that a theology known as the “theology of the people” also gained recognition. This was a theology that Archbishop Bergoglio would embrace and promote.

**The Major Theological Influences on Pope Francis**

There are two major theological approaches that I will explore in relation to their influence on Pope Francis. The first of these will be French Dominican Yves Congar (1904-1995) and the second will be the “Theology of the People.”

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13 In his book *The Great Reformer*, Austen Ivereigh describes Yves Congar as a theologian who was one of Pope Francis’ “lodestars.” Ivereigh claims that Congar “taught him (Pope Francis) how to unite God’s People by a radical reform that will lead them to holiness.” See pages XV and 93-94.
14 A “theology of the people” has its origins in Argentina. Rafael Tello and Juan Carlos Scannone are two early proponents of the theology and were known to Pope Francis. In Rafael Luciani’s book *Pope Francis and the Theology of the People*, Rev. Dr. Omar Cesar Albado states: “Little by little it became known that behind Francis was a theology with a regional flavour, prepared in the crucible of thought that dared to recognize a place for popular religiosity as an integral part of religious virtue and for popular culture as a specific and meaningful way of living the faith. One of the main currents of theological insight in Argentina was conceived in proximity to the very poor and involved directing the Church’s efforts at evangelization outward toward the vast majority excluded from church structures.” (Maryknoll NY: Orbis Books, 2017), X.
In his book *True and False Reform in the Church*, Congar argued that if reform is directed by self-enclosed groups and separated from the ordinary faithful it would be false reform. The book was first published in 1950 and the Holy Office initially blocked its reprinting and translation. This stoppage was short-lived as Congar was invited by Pope John XXIII to be a member of the Second Vatican Council’s theological preparation commission. Congar claimed that Church reform is a constant necessity, but if it is to be real reform it must avoid schism. He proposed a way in which hierarchal leadership and local church communities play a role to ensure that reform is true, rather than false. “The Church is not an institution; it is a communion; a unity of persons who share attitudes that must be broadly shared. Reform represents an ongoing feature in the life of the Church and is necessary for that communion.”\(^{15}\)

The people of God must take responsibility for the Church, but do so in a spirit of ownership, not opposition. Their voices are the “frontier” voices of the Church because they are outside the Church’s central decision making body, but this centralised hierarchal body must be prepared to listen to what the frontier is saying. For the sake of the unity and continuity of the Church, the hierarchy needs to reflect on the “reformation” expressed by the “frontier,” and after careful consideration, adjudge whether to incorporate the reform into the heart of the Church. For their part the reformers require patience. Problems arise when the reformers lack patience and the hierarchy are so “distant” that they have lost the capacity to listen:

The system of powerful central authority which has prevailed in the church since the 16\(^{th}\) century has, in its way, tended to interpret every critique as arising from a spirit of opposition and even from dubious orthodoxy. A simplistic apologetics has often thought that it was necessary to defend

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\(^{15}\) Yves Congar, *True and False Reform in the Church*, 9.
everything. This attitude has defended the sanctity and perfection of the church using ideas that are not always correct and which can only be maintained, if the truth be told, by refusing to see things as they actually are.\textsuperscript{16}

Yves Congar spoke about a Church of the poor being an authentic sign of reform. He spoke harshly of a Church of affluence and influence:

In truth, have we really been working for the success of the ecclesiastical system? Haven’t we often confused the spiritual with ecclesiastical, and the essential relation to God with the mere observance of means and external forms? This danger becomes even more acute when the church, established as a sacred institution in society, enjoys honours, riches, material advantages, and easy influence. This danger is even greater when, not only enjoying the advantages of power, the church itself holds and exercises power, as was the case in the Middle Ages under the bureaucratic-hierarchal structures of Christendom.\textsuperscript{17}

A Church fixated on worldly power and prestige is a Church that has forgotten that Jesus was poor and that the Good News was first addressed to the poor.

It is sometimes good for the church to be led by poverty to rediscover the truth of its mission and the full freedom of her apostolic actions. In a way, it is good to be pushed back by the resistance of the world in order to reclaim the church’s evangelizing spirit. Isn’t this a frequent theme of apostolic writings? Persecution, temptations, even heresies are needed so as to test the faithful and purify the people of God.\textsuperscript{18}

**Pope Francis and a Theology of the People**

In Chapter One, I spoke of the theological framework that Gustavo Gutiérrez’s *A Theology of Liberation* proffered in regard to the formulation on the teaching of the preferential option

\textsuperscript{16} Ibid., 32.
\textsuperscript{17} Ibid., 142.
\textsuperscript{18} Ibid., 147.
for the poor. In his revival of the teaching, Pope Francis has adopted aspects of this framework but his major theological influence is a “Theology of the People.”

The theology of the people has its roots in Argentina. This theology does not look at the poor from a socio-economic or class category, it focusses on the connection between faith and culture. Like liberation theology it believes that the poor should be agents of their own change and that they contain the potential to evangelise the universal church. Both recognise and practise the definition of the Church as the “people of God” and the need for liberating praxis. Unlike some proponents of liberation theology, a theology of the people respects and encourages localised piety. For many liberation theologians, the fact that these pious practises were never frowned upon by the political, economic and religious elites was considered evidence of their incapacity to impact sinful structures. In a theology of the people, the necessity for people to struggle for their liberation remains but the preservation of their sociocultural practices is considered vital for their identity; in fact respect for their religious practises falls within the criterion of an option for the poor. Theologian Rafael Luciani states: “It is impossible to be Church without being incarnate in the midst of peoples, responding to their culture.”

For Pope Francis being incarnate in the lives of the poor is a place where the Church should not only reside, it is a place where it draws inspiration. Pope Francis speaks of the “periphery” of the Church becoming a model for the universal Church. This “periphery” is a people whose starting point for life and even in the Church is a position of vulnerability. They encounter God and the world from this unique position. It is not just their poverty that

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19 See pages 42-44.
20 Rafael Luciani states: It was in Argentina that what was to be known as the “theology of the people” first began to take shape, taking on the task of developing a communal form of being church within a collegial structure.” (Pope Francis and a Theology of the People (Maryknoll NY: Orbis Books, 2017), 1
21 Ibid., 5.
defines them; it is also their faith and their culture. The importance of local culture in the proclamation of the Gospel was recognised at the Puebla Conference (1979):

> The proclamation of the Gospel can no longer be understood in isolation from the local culture in all its complexity. Any action of evangelization will entail a process that leads to the transformation and liberation of persons and structures from within, from the sociocultural mediations in which persons live and conduct their lives in society.\(^\text{22}\)

Similar to liberation theology, a theology of the people does not view the Church hierarchy as the sole transmitters of the faith; it is the people of God who are a *locus theologicus*. “Disciples encounter others from within, from their life world. This outgoing movement draws inspiration from the historical praxis of Jesus, who always went out to meet the other, the needy, and the marginalized, and it was these encounters with persons in concrete situations that changed his life.”\(^\text{23}\)

In a theology of the people, it is the people’s own culture experienced within a Christian framework that is the animating force in their practise of the faith. This is an evangelising culture rather than an ecclesiastical culture. The Pope adjudges any attempt to impose or indoctrinate people as forms of colonialism and incongruent with a preferential option for the poor. In simple terms we should go out and meet the people where they are at, rather than have a somewhat arrogant predetermination of knowing what is good for them.\(^\text{24}\)

When Pope Francis talks about the “peripheries” he is talking about the majority and he is talking about the poor. In a Church of the poor strength does not come from power or domination but from vulnerability and humility, a place where we need to trust in God and in each other. A Church that is wealthy, powerful and clerically controlled cannot be a

\(^{22}\) Puebla # 392.  
\(^{23}\) Rafael Luciani, *Pope Francis and a Theology of the People*, 85.  
Church of the Poor. Medellín recognised this and now Pope Francis is re-emphasising its importance. The CELAM Conference at Aparecida stated:

> We have been reduced to living small lives, cocooned with religious elites who no longer know how to connect with the sociocultural reality of the poor majorities. This can be overcome only by an alternative paradigm of humanity, especially one that is critical of the current ecclesial culture and its emphasis on self-preservation.”

The introduction to this thesis stated that a person did not need to be a liberation theologian to practise the preferential option for the poor and the examination of Dorothy Day and the CWM in Chapter Four sought to illustrate this point. Liberation theologian, Leonardo Boff argues that Pope Francis is another example. The crucial element, Boff says, is not theology per se but that the Pope’s rhetoric and pastoral initiatives are aimed at liberating the oppressed. Boff describes the preferential option for the poor as liberation theology’s “registered trademark” and this is a trademark that the Pope clearly lives. “Pope Francis has taken this option for the poor; he has lived and continues to live in solidarity with them and has said very clearly that he would like a poor church for the poor.”

Boff believes that the theology of the people is similar to liberation theology in its endeavours to support the poor and oppressed.

> Without having to use the more common expression “liberation theology,” he never departed from his basic insight and fundamental aim: to make the faith an instrument for the liberation of the oppressed. Instead of doing a class analysis showing the origins of impoverishment and social oppression, theology of the people prefers to analyse popular culture in its dynamism and its contradictions, stressing the elements of participation and liberation that are present in it.

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27 Ibid., 78.
Despite Pope Francis’ affiliation with a theology of the people, Boff claims that one of the Pope’s strengths is that he is not attached to any single theology. He says that Francis’ predecessors “held to a certain type of theology that presented itself as an expression of the official magisterium” and that this approach stifled theological and pastoral creativity. “The different forms of condemnation or censure created an atmosphere of distrust and fear within the church, which was harmful both to theological reflection and to pastoral practice.” Boff intimates that Pope Francis is eradicating this “distrust and fear” by appreciating the people as a locus for theological reflection and encouraging local communities to discern appropriate pastoral practices.

A theology of the people continues and expands the idea initiated by liberation theology of the evangelising power of the poor. Their expressions of faith should be influencing the universal Church and contributing to ecclesial reform. Rafael Luciani explains:

> If the people are the subject and agent of their own history, the Church is in debt to the people, and not the reverse. In other words, it is the periphery that gives meaning to this centre and not the other way around; it is daily and sustained relationship, lived in faith that shapes a people and gives them meaning as a people of God, and not their belonging to an official religion. The upshot is an incarnational inversion, by which both theological reflection and pastoral action become oriented toward the people, and primarily from the people.  

### Part II: Pope Francis and a Church of the Poor

Pope Francis’ vision of Church renewal is, I believe, an authentic attempt to answer the challenge first presented by Pope John XXIII in his call for a “Church of the Poor.” This is a

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28 Ibid., 78.
29 Ibid., 78.
30 Rafael Luciani, *Pope Francis and the Theology of the Poor*, 7.
Church that was to be different to the Church of Pope John XXIII’s time and would be different to the Church we are now. In other words, this is a vision of Church that requires transformation. This is not just a Church that increases its charitable contributions, it is a Church transformed by its own poverty and vulnerability. This is a Church willing to jettison its historical privileges and seek ways to exercise its mission in a spirit of service, as is evidenced in the Gospel. While it is true that Church history is replete with people both lay and religious who have displayed sacrificial service in conformity with Gospel values, the ecclesial structures are more often than not associated with privilege and power. During the Second Vatican Council, Yves Congar wrote:

It is a fact that at a time when the whole “mystique” of the Church stresses love of the poor and even of poverty, when the Church is truly poor, even sometimes in real need almost everywhere, yet she has the appearance of wealth, and (in a word) of privilege, or has pretensions in that direction. This harms both herself and the cause for whose service she has made and which she truly does desire to serve. How has this regrettable appearance come about?31

Congar’s description of the Church was an accurate depiction of the Church in Latin America (and elsewhere) that the Medellín Conference and Gutiérrez sought to overcome. In order to remove itself from this privileged position, Congar suggested a simple, but as yet unrealised suggestion that the Church needed to dismiss its titles. These titles he said were more in keeping with the rhetoric of empires rather than the Gospel.

Titles such as “my Lord Bishop” are, or should be, the province of local history societies, together with old titles vested in chapters, which only rarely survive nowadays and are reflected in a few details of costume. Feudalism is a thing of the past. Yet surely there still clings about bishops

31 Yves, Congar, Poverty and Power in the Church (New York: Paulist Press, 2016), ix.
and the Curia an aura of feudal privilege expressed in dress, insignia, “retinue,” the deference paid to them, all the trappings of heraldry?\textsuperscript{32}

This quote is over fifty years old but there has been little if any change in this area. What I am attempting to do is illustrate that Pope Francis’ renewal, contains elements of the unrealised reforms of ideas that were present at the Second Vatican Council. Furthermore, these reforms would be vital in the establishment of a Church of the poor. Somewhat ironically, the inability or unwillingness of the Vatican to pursue this ideal of Church has occurred in a time when the Church has officially recognised the teaching on the preferential option for the poor. The stagnation of this teaching has, in part, resulted from the Church’s reluctance to embrace the challenges of becoming a Church of the poor.

When the CELAM Conference at Medellin began the task of separating the Church from its historical alignment with the powerful economic and political elites of Latin America, its intent was to guide the Church to a closer proximity to the poor and to the Gospel. This transition did however create tension between the established conservative elements of the Church and the reformers. The controversy surrounding Saint Oscar Romero was clear evidence of this tension. Pope Francis’ reformation acknowledges that for the last few decades the Church’s comfortability with political and economic powers and its inherent clericalism remains intact. For Pope Francis, clericalism is a distortion of ecclesial power and a false representation of Church authority.\textsuperscript{33}

\textsuperscript{32} Ibid., 67.

\textsuperscript{33} Clericalism refers to a priesthood that accepts and encourages entitlements due to their position rather than their personhood. Lay people may contribute to this by granting entitlements to clerics who receive an inflated notion of power and act accordingly. In the recent Australian Royal Commission into child sex abuse the findings in relation to the Catholic Church described clericalism and entitlement as a contributing factor in the initiation and continuation of abuse (Volume 16, chapter 2). Pope Francis in EG makes specific references to the dangers of clericalism arguing that it has shut out lay people from decision-making (102), that sacramental power should not be identified with power in general (104), and that seminaries should not accept candidates displaying a desire for power(107).
Pope Francis is seeking a “restorative” program of his own but for him it is the Gospel that he wishes to return the Church, and more importantly, it is the faithful periphery that he believes can guide the Church there. “Francis proposes a gospel hermeneutic of culture in a prophetic-rather than a doctrinal or a cultic-key, and takes the praxis of Jesus as the primary reference point for all theologico-pastoral activity aimed at generating processes of change in today’s global mindset.”

Pope Francis, Pope Benedict XVI and Pope John Paul II were all critical of a world that is indifferent to the poor. They would all agree that greed, individualism and materialism see a minority of humanity adversely affecting the majority of humanity. One senses that all these Popes would be disappointed that the Church has been ineffectual in confronting this “anti-evangelical” position. Their responses however differ significantly. In Chapter Three I described the theological, philosophical and ecclesial methodology of Popes John Paul II and Benedict XVI as contributing to the stagnation of the teaching of the preferential option for the poor. The word stagnation implies that the teaching is not dead, but is in need of revival and renewal. Pope Francis advocates a methodology more in keeping with liberation theology by turning to the poor for renewal of the teaching. “The actual topic of liberation and the option for the poor was to be the specific contribution of the Latin American Church to the universal Church. Only from a liberation rooted in an option for the poor can the anthropocentric individualism characteristic of modernity be overcome.”

The historical praxis of Jesus is the model for all Christians. In obedience to the Father’s will Jesus proclaims and initiates the Kingdom of God. Our own commitment is to continue to build this Kingdom. Our commitment is not to the Church but to the Kingdom. It is as a

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34 Rafael Luciani, *Pope Francis and a Theology of the People*, xvii.
35 Ibid., 65.
Church and in the Church that we participate in this project. For the Church to rediscover its prophetic mission and engage in the divinely inspired project of building God’s kingdom the Pope advocates that we become a Church of the poor; a Church separated from the allure of power and privilege.

Being a poor Church is the necessary prior condition for being a church of and for the poor; otherwise it will not be a credible sign and sacrament capable of converting hearts. Indeed, as people of God it is called to mediate salvation through actions and gestures of liberation from everything that dehumanizes and divides its members. This is the sense in which Francis believes that unless the problems of the poor are addressed no one will do well because the problems of the world will not be resolved.  

In taking the name of Francis and calling the Church to become a Church of the poor the new Pope offered a glimpse of the direction and style that his papacy would take. Paul Vallely states: “Might he mean that the era of the institutional church, with its power and pageantry, scandal and silk-brocaded vestments were over, and that one bearing the Franciscan virtues of poverty, simplicity, humility, sharing, obedience and wisdom was being ushered in?”

In the moments following his election as Pope, Francis was embraced and kissed by Brazilian Cardinal Claudio Hummes who told him not to forget the poor. The truth is that a vast majority of popes have never forgotten the poor, but the question is what will Francis do that is different? He has publicly declared he wants a Church of the poor but how will he communicate this ideal of Church to the people of God? What role will the teaching on the preferential option for the poor have in his vision?

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36 Ibid., 51.
I have on innumerable occasions throughout this thesis written on the significant influence that the Vatican II definition of the Church as the “People of God” had on liberation theology. This definition was a sign of ecclesial renewal that provided impetus to the formulation on the preferential option for the poor. José Comblin described it as the most significant theological contribution to the Vatican II documents. The diminishing influence of this definition during the papacies of Pope John Paul II and Benedict XVI impacted negatively on the teaching of the preferential option for the poor. Defining the Church as the People of God was an attempt to decentralise the Church. This in turn encouraged the peripheries, (and in the case of Latin America this meant the poor), with the opportunity to voice their faith and evangelise the Church. The teaching of the preferential option for the poor emerged from this model of Church.

A centralised authority exercising juridical control was not an effective methodology for the poor to influence the Church. Vatican II, Medellín and liberation theology recognised this.

Writing during the Second Vatican Council, Congar said:

> We are still a long way from reaping the consequences of the rediscovery, which we have all made in principle, of the fact that the whole Church is a single people of God and that she is made up of the faithful as well as the clergy. We have an idea, we feel implicitly and without admitting it, even unconsciously that the “Church” is the clergy and that the faithful are only clients of beneficiaries. This terrible concept has been built into so many

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38 See pages 49-50, 59, 106 and 128-131. See also pages 234-238 in the chapter.
39 “Many believed that the concept of “people of God” was Vatican II’s main theological contribution, affecting all the council documents; it is certainly the best expression of the “spirit” of Vatican II.” *People of God,* (Maryknoll, NY: Orbis Books, 2004), vii.
40 “It required no particular genius to discover that the key to the council’s ecclesiology was the people of God, which provides a basis for lay initiative, different pastoral options, and temporal commitment, varying by country and continent. The notion of the people of God was the most serious threat to Roman centralization, because it was the justification for the decentralization of power in the church: everyone else would gain but the church would lose.” (Jose Comblin, *People of God,* 50)
structures and habits that it seems to be taken for granted and beyond change. It is a betrayal of truth.\textsuperscript{41}

The diminishment of the Vatican II ideal of the Church as the “People of God” was to the detriment of the teaching on the preferential option for the poor. The renewal of this definition under Pope Francis is just one of the factors that have the potential to reignite it.

**Pope Francis’ *Evangelii Gaudium* (The Joy of the Gospel)**

Pope Francis’ “template” for a “Church of the Poor” can be found in the 2013 document titled *Evangelii Gaudium* (EG) and this theme is continued in the 2015 social encyclical *Laudato Si’* (LS). EG is an apostolic exhortation which urges the reader or listener to take heed and act. Pope Francis is calling for communities to be guided by the document but to be creative in their response. There is a call in EG for a Church that looks externally rather than internally; it is a call to go to the periphery of society. “Each Christian and every community must discern the path that the Lord points out, but all of us are asked to obey his call to go forth from our own comfort zone in order to reach all the “peripheries” in need of the light of the Gospel.”\textsuperscript{42} This “encountering Christ through the other” is a vital ecclesial praxis if the Church is to be a Church of the poor. “Encounter with others is vital, because faith is an encounter with Jesus, and we must do what Jesus does: encounter others. We need to create a culture of encounter. Another important component of this is that when we step outside ourselves we find poverty.”\textsuperscript{43}

\textsuperscript{41} Yves Congar, *Power and Poverty in the Church*, 78.
\textsuperscript{42} EG, # 20.
Pope Francis says that when we encounter the poor, we not only meet Christ (Matthew 25:31-46), we encounter the woundedness of the world and through this relationship the Church’s transformation can begin:

The poor are also the privileged teachers of our knowledge of God: their frailty and simplicity unmask our selfishness, our false security, our claim to be self-sufficient. The poor guide us to experience God’s closeness and tenderness, to receive his love in our life, his mercy as the father who cares for us, for all of us, with discretion and paternal trust.  

In the Introduction to this research paper I stated that the preferential option for the poor was a theological teaching; that it was an option grounded in the mission of Jesus Christ as illustrated in the Gospel. Fidelity to the teaching is primarily an authentic sign of discipleship prior to it being a commitment to Church teaching. It was Gutiérrez and his fellow liberation theologians who had insisted that the teaching on the preferential option for the poor was a theological, rather than an ethical category. Gustavo Gutiérrez stated that authentic theology required an encounter with the Lord and that this encounter could be experienced via solidarity with the poor. “The identity of the Church leads us into solidarity with the poor and insignificant people; in these we find the Lord who shows us the way to the Father.” The teaching on the preferential option for the poor is not the result of an ethical theory but of an encounter with the Lord, experienced via solidarity with the poor and the aforementioned quote from Pope Francis concurs.

To place the teaching solely in the ethical realm would impoverish it and jeopardise its proper place in the heart of the Church’ identity and mission. The role of ethics is to assist in the practical application of the teaching. The 1984 document Instruction on Certain Aspects

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44 Ibid., 120.
45 See Introduction, pages 3-4.
of the Theology of Liberation wanted to “awaken Christian consciences” (# 24), and the 1986 document Christian Freedom and Liberation spoke of “enlightening Christian consciences” (# 59). The teaching on the preferential option for the poor is an invitation to transform the Church and goes well beyond an appeal to the individual Christian conscience.

In Chapter One I quoted Stephen Pope who described why CST used the Natural Law Theory as its ethical framework: “The Church turned to natural law for two principal reasons. The first is that Sacred Scripture provides neither a moral philosophy nor an extensive body of law with which to govern political communities.” In the same chapter I quoted the Compendium of the Social Doctrine of the Church which stated that: “The principles of the Church’s social doctrine are based on the natural law. We can see the importance of moral value, founded on the natural law written on every human conscience; every human conscience is hence obliged to recognise and respect this law.” Charles Curran pointed out the limitations of this definition by stating that reliance on the natural law diminishes the revelation of Jesus Christ as a highly significant contributor to Christian morality. The teaching on the preferential option for the poor is not founded in every human conscience. It is founded on God’s revelation which is most pertinently seen in the Incarnation and the Word of God. The preferential option for the poor is rooted in Sacred Scripture and uses “divine preference” as its framework, not the natural law.

47 Stephen Pope, “Natural Law in Catholic Social Teachings”, in Modern Catholic Social Teaching, 42.
Pope Francis is clear in his understanding of the theological position of the teaching: “For the Church, the option for the poor is primarily a theological category rather than a cultural, sociological, political or philosophical one.”

While Gutiérrez explained the necessity of concrete solidarity with the poor, he acknowledged that by virtue of his priesthood, he did not suffer their vulnerability; his priestly position afforded him a “non-poor status.” It was Jon Sobrino who began to more fully explore the theological implications of the vulnerability of the poor. The poor, Sobrino said, live under a pressure that refuses to subside; it is a constant struggle that offers no respite. It is this vulnerability that leads to a dependence upon God and if we incorporate their experience into every level of the Church, it leads the Church to a place of humility and vulnerability rather than triumphalism.

A Church of the poor offers a theological understanding of both poverty and vulnerability; in fact it will (among other things) be formed by the wounded knowledge of suffering people. This is the bruised Church of which EG speaks: “I prefer a Church which is bruised, hurting and dirty because it has been out in the streets, rather than a Church which is unhealthy from being confined and from clinging on to its own security.”

While there are biblical quotes that describe Jesus adopting a fairly ambiguous approach to poverty, (Matthew 26:11 speaks of the literal poor that you will always have with you and Luke 12: 22 writes in a context related to faith that we should not worry about what we eat or wear). Feeding, healing and an inclusivity regarding the outcast are prevalent in Jesus’

49 EG, # 198.
50 Theologian Megan McKenna says that the poor’s dependence upon God is in part due to the fact that experience has taught them that they cannot rely on us. Send My Roots Rain (New York: Doubleday, 2003), 298.
51 EG # 49.
mission. Sobrino argued that Jesus not only addresses his message to the poor, which includes outcasts and sinners but also resists any temptation to side with powerful forces. "Jesus chose to be poor and rejected the temptations of materialism, power, wealth and idolatry. He also preached to the poor as his first addressees to be offered a gospel of joy. Jesus associated with the poor and challenges the intellectual elites."\(^{52}\)

In EG, Pope Francis describes the importance of the preferential option for the poor for the Church’s mission:

> This divine preference has consequences for the faith life of all Christians, since we are called to have “this mind....which was in Jesus Christ (Phil 2:5). Inspired by this, the Church has made an option for the poor which is understood as a “special form of primacy in the exercise of Christian charity, to which the whole tradition of the Church bears witness."\(^{53}\)

The poor live their faith in a manner which aligns them in a unique manner with the suffering of Christ; they can sing “Were You There When They Crucified My Lord” from an existential position. The Church of the poor will simultaneously seek to alleviate suffering and yet be evangelised by those who suffer. “This is why I want a church which is poor. They have much to teach us. Not only do they share in the sensus fidei, but in their difficulties they know the suffering Christ. We need to let ourselves be evangelised by them.”\(^{54}\)

**Part III: The Church of the Poor: A Transformation of Orthodoxy**

In his book *A Church of the Poor*, theologian Clemens Sedmak, describes *Evangelii Gaudium* as Pope Francis’ “transformation of orthodoxy.” In the introduction, Sedmak asks “Would a

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\(^{52}\) Clemens Sedmak, *A Church of the Poor* (Maryknoll NY: Orbis Books, 2016), 37.

\(^{53}\) EG, # 198.

\(^{54}\) EG, # 198.
Church of the Poor change our theological understanding of orthodoxy?”\textsuperscript{55} The book then proceeds to argue that it has the potential to do so.

Orthodoxy in the face of the experience of the abrogation of knowledge is not so much “holding on to the right belief” but “keeping faith when one’s belief is shattered.” A Church of the Poor will accept the possibility of abrogation in the light of the divine creativity; a Church of the poor will respect faith experiences of poor people as epistemically shattering transfiguration.\textsuperscript{56}

Sedmak contrasts “Propositional Orthodoxy” with “Existential Orthodoxy.” Propositional orthodoxy is declared by Church authorities but as there have been so many voiceless people in the history of the Church this orthodoxy comes from a limited epistemic position. This does not make it wrong, but it is limited and can lead to a narrow and limited view of orthodoxy. This limitation was described by Karl Rahner over fifty years ago:

When you ask the orthodox Christian for his beliefs, he will refer you to the Catechism, where all the truths of faith which have been expressed most explicitly and in an existentially clear manner in the history of the Faith up to date, have kept their unchanged place. The orthodox Christian seldom stops to realize that the unprinted catechism of his heart and religious life has quite a different distribution of materials from his printed Catechism, and that in the former many pages of the latter are missing completely or have become quite faded and illegible.\textsuperscript{57}

Sedmak accepts that ignoring the “printed Catechism” would be epistemically irresponsible but he sees this propositional orthodoxy as having ignored the lived catechism of the poor. The poor are a necessary ingredient in the Church’s pursuit of a fuller and therefore more authentic orthodoxy.

\textsuperscript{55} Clemens Sedmak, \textit{A Church of the Poor}, XXI.
\textsuperscript{56} Ibid., 58.
Pope Francis favours existential orthodoxy and makes it clear that he wants the Church to avoid being shackled by doctrine (propositional orthodoxy): “A supposed soundness of doctrine or discipline that leads instead to a narcissistic and authoritarian elitism, whereby instead of evangelising, one analyses and classifies others, and instead of opening the door to grace, one exhausts his or her energies in inspecting and verifying.” Pope Francis favours existential orthodoxy so that the Church’s epistemic position is broadened.

If we extrapolate this thinking to Saint Oscar Romero’s historical situation we can ask the following question. Was Romero acting in an orthodox manner or not? Many of his fellow Bishops, and indeed those in the Vatican, believed he was not and the opposition to him and his potential removal was evidence of this. If we shift the focus from propositional orthodoxy to existential orthodoxy, Romero’s position could change. In this new scenario, those Church people in El Salvador who had been regarded by the Vatican as “orthodox,” but had been complicit with the powerful elite and lacking in any concrete solidarity with the poor would become “unorthodox.” Alternatively, Romero having distanced himself from the powerful elites and immersed himself in the life of the poor and oppressed would have the “orthodox” position. This is what is meant as the transformation of orthodoxy and Pope Francis is trying to make a poor and vulnerable Church orthodox. Within this framework it is the periphery that influences the centre rather than the other way around. This would be a shift in the Church’s epistemic positioning.

Propositional orthodoxy is easily administered insomuch as it is based upon a doctrine and not a relationship and relationships can be challenging. For Pope Francis, the way we relate to our neighbours and strangers is vital to our identity as Church. The difficulty with an

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58 EG, # 94.
59 See pages 64-66.
orthodoxy based upon relationships is that it will be subject to error, but this is representative of a bruised and wounded Church. This heightened vulnerability should lead to a more expansive understanding of how we are to be Church. It is not a path toward a perfect or doctrinally pure Church; it is the “People of God” trying to negotiate its way through history in the light of faith.

Evangelii Gaudium is Pope Francis’ blueprint for a Church of the Poor, but for this Church to be realised it must leave its safe place and this includes its epistemic safe place. In keeping with Congar’s understanding of true reform within the Church, this is a Church which allows the peripheries to penetrate its core. This transformation is based upon the Gospel accounts of Jesus who challenged the epistemic position of the religious leaders of his day. It is also worth noting that in the story of the Canaanite woman (Matt.15: 21-28; Mark. 7: 24-30), it is the woman who challenges Jesus’ epistemic position and initiates a transformation.

Evangelii Gaudium utilises criteria that have been consistently used to influence the formulation, understanding, and application of the preferential option for the poor. Two of the criteria evident in EG that I would like to highlight are “Ecclesial Praxis” and the definition of the Church as the “People of God.”

**Ecclesial Praxis**

Pope Francis’ transformation of orthodoxy anticipates ecclesial renewal. The ecclesial renewal evident in EG is summarised by Austen Ivereigh: “A Church of and for the poor, rooted in the Second Vatican Council, geared to mission, focussed on the margins, centred on God’s holy faithful people, in constant dialogue with culture yet bold in denouncing what
harm the poor."\(^\text{60}\) If I were to be critical of this summary I would suggest that the one thing missing is an announcement of historical projects that liberate the poor. The denouncement of that which harmed the poor should be followed by announcements that benefit them as this would be in keeping with the underpinning philosophy on the preferential option for the poor.

Pope Francis calls the whole Church, including the papacy, to this renewal and challenges it to a missionary conversion.

An evangelising community gets involved by word and deed in people’s daily lives; it bridges distances, it is willing to abase itself if necessary and it embraces human life, touching the suffering flesh of Christ in others. Evangelisers thus take on the “smell of the sheep” and the sheep are willing to hear their voice.\(^\text{61}\)

With a later reference to evangelisers getting their “shoes soiled by the mud of the street”\(^\text{62}\) we can see the centrality of existential orthodoxy and ecclesial praxis entering into the heart of the Church’s identity. Walter Kasper writes:

> The spirituality of standing up for others and taking their place could break up the inward-looking orientation of many communities in their current diaspora situation within a secularized world, and it could become a spiritual guidepost for both today and tomorrow. Love of neighbour, when lived in a radical way, thus points to the ecclesial dimension.\(^\text{63}\)

Ecclesial praxis is lived out by a community and as such cannot be separated from the institutional structures of that community. This is why reform of the institutional Church is necessary. This ecclesial renewal will require more than a personal commitment if it is to penetrate the heart of the Church’s identity and mission. Pope Francis accepts that for those

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\(^\text{60}\) Austen Ivereigh, *The Great Reformer*, 211.  
\(^\text{61}\) EG # 24.  
\(^\text{62}\) EG # 45.  
who favour teaching a “monolithic body of doctrine void of nuances” that this style may be confronting but he wants a Church that speaks more of grace than law, more of Christ than the Church, and more of God’s word rather than the Pope’s.

Ecclesial praxis requires a mission of encounter, especially with the peripheries. This encounter is with those who have previously been absent from contributing to the Church’s theological, philosophical, pastoral and structural components. It is from these very encounters that we gain knowledge of God and people, and this in turn expands the horizon of the Church and allows for its transformation. It is this experiential knowledge that informs and then forms the Church’s epistemic praxis. Sedmak warns of the real change that this approach can cause: “It may leave bruises for the perfect architecture of the doctrinal building and it may be incompatible with epistemic purism.”

_Evangelii Gaudium_ clearly articulates the Church the Pope does not want. “We are not a Church that promotes a “spirituality of well-being” divorced from community life, or to a “theology of prosperity” detached from responsibility for our brothers and sisters.” The capacity to look outward and be historically constituted is also emphasised. “In some people we see an ostentatious preoccupation for the liturgy, for doctrine and for the Church’s prestige, but without any concern that the Gospel has a real impact on God’s faithful people and the concrete needs of the present time.”

Pope Francis believes that ecclesial structures need decentralising and that the Church needs to practise a collegiality that allows episcopal conferences more authority:

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64 EG # 40.  
65 EG # 38.  
66 Sedmak, _A Church of the Poor_, 24.  
67 EG # 90.  
68 EG # 95.
Yet this desire has not been fully realised, since a juridical status of episcopal conferences which would see them as subjects of specific attributions, including genuine doctrinal authority, has not yet been sufficiently elaborated. Excessive centralisation, rather than proving helpful, complicates the Church’s life and her missionary outlook.\footnote{EG # 32.}

The document’s missionary enthusiasm respects the importance of the social dimension of evangelisation: “It is no longer possible to claim that religion should be restricted to the private sphere and that it exists only to prepare souls for heaven. It follows that Christian conversion demands reviewing especially those areas and aspects of life “related to the social order and the common good.”\footnote{EG # 182.} People are transformed by the experience of engagement rather than ideology and therefore the ecclesial renewal Pope Francis is encouraging is based upon a historically constituted praxis.

The document contains elements of Pope Paul VI’s 1971 apostolic letter \textit{Octogesima Adveniens} which encouraged a greater localised participation in the decision-making practices of the Church. It also hints at greater respect and freedom for bishop’s conferences and therefore encourages collegiality.\footnote{In the September 28\textsuperscript{th} edition of the \textit{The Tablet} there is an article which has Cardinal Reinhard Marx stating that the Pope had encouraged him (Marx) to “continue the binding synodal procedure for church reform that the German bishops plan to hold with the (lay) Central Committee of German Catholics, the \textit{Zdk}.” 29.}

\textbf{The People of God}

Pope Francis makes no attempt to debate the definition of the Church as the People of God; he accepts and embraces it. EG states that clergy are a minority who are meant to serve the majority and it is excessive clericalism that stifles the people’s participation in the Church.\footnote{EG # 102.}
Pope Francis argues that the People of God is a definition that is respectful and representative of the *sensus fidei* (the instinct of faith) being present in all peoples.\textsuperscript{73}

Of even greater importance and an expansion on the original definition is the Pope’s recognition of the diversity of cultural expressions present in the faith. “We would not do justice to the logic of the incarnation if we thought of Christianity as monocultural and monotonous. The content of the Gospel is transcultural.”\textsuperscript{74} The transcultural nature of the Gospel allows Pope Francis to connect the Church as the “People of God” with a “Theology of the People.”

Each portion of the People of God, by translating the gift of God into its own life and in accordance with its own genius, bears witness to the faith it has received and enriches it with new and eloquent expressions. One can say that a people continuously evangelises itself. Herein lays the importance of popular piety, a true expression of the spontaneous missionary activity of the People of God.\textsuperscript{75}

Just as the BECs were a *locus theologicus* for the emergence of liberation theology, popular piety plays a similar role in a theology of the people. Quoting the CELAM document from Aparecida (2007), EG describes popular piety as “spiritually incarnated in the culture of the lowly.”\textsuperscript{76}

The relationship between a praxis-theology and the People of God is one that allows and encourages local responses to particular situations in the light of the Gospel. Pope Francis does not regard the Word of God as the domain of the authorities. “The Church has to accept the unruly freedom of the word, which accomplishes what it wills in ways that

\textsuperscript{73} EG # 198.
\textsuperscript{74} EG # 117.
\textsuperscript{75} EG # 122.
\textsuperscript{76} EG # 124.
surpass our calculations and ways of thinking.”

By describing the Word as unruly, the Pope recognises its capacity to shift us from our complacency. “Realities are greater than ideas. This principle has to do with incarnation of the Word and it being put into practice. This principle of reality, of a Word already made flesh and constantly striving to take flesh anew is essential to evangelisation.”

Dialogue and listening are given significant attention in EG; in fact, dialogue is regarded as a significant ingredient of evangelisation. I would further suggest that dialogue is a vital component of understanding what the Church as the “People of God” really entails. Earlier, I quoted Gustavo Gutiérrez and his description of dialogue as that which includes two voices and two silences and Pope Francis echoes this definition by imploring the Church to be one that listens. “We need to practice the art of listening. Listening, in communication is an openness of heart and helps us to find the right gestures and words. It is respectful and compassionate listening that enables us to enter on a path of true growth and awakens a yearning for the Christian ideal.”

For the Church to truly become a Church of the poor it will need to listen to the poor and it is by listening to the faith of the poor the Church can undergo a transformation.

Pope Francis’ commitment to collegiality, synodality and popular piety is an indication of internal Church dialogue but in the Spirit of Vatican II he extends this dialogue beyond Church parameters. Pope Francis is not seeking to create a diaspora within the secular

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77 EG # 22.
78 EG # 233.
79 EG # 165.
80 See pages 140-141.
81 EG # 171.
82 Synodality refers to a practice of the church which seeks to involve the entire baptized community in discerning God’s will. It encourages the participation of all Church members to proclaim God’s love and salvation through Jesus Christ. Pope Francis has declared that the primary focus of the 2022 world Synod of Bishops will be For a Synodal Church: Communion, Participation and Mission.
world; he wants the Church to engage. This approach reflects that of American theologian David Tracy. Tracy argued that we can only engage in authentic dialogue when we begin from our own “informed place.” It is not about compromise, but discovering “similarities–indifference;” a discussion that can challenge our perceptions and lead to a deeper understanding of our own and others’ positions.

We can retreat into our righteous purity of a siege mentality where we alone possess the truth and we build our righteous worlds unsullied by the ‘inviolable ignorance’ of the alien others. Fundamentalists, traditionalists, and dogmatists in every religion, monists in every movement of thought need not trouble with messy pluralism. They already know the truth – a truth, it seems, that sets them free from the world but never for it.83

Tracy’s dialogical method serves as a warning for both society and the Church not to retreat into their own security and Pope Francis concurs:

A healthy pluralism, one which genuinely respects difference and values them as such, does not entailprivatizing religions in an attempt to reduce them to obscurity of the individual’s conscience or to relegate them to the enclosed precincts of churches, synagogues or mosques. This would represent, in effect, a new form of discrimination and authoritarianism.84

Catholic Social Teaching has consistently sought to communicate its message to all people of good will and Pope Francis’ promotion of dialogue is a healthy reminder of this tradition.

Liberation theology believed that the “irruption of the poor” would be a significant contribution to the renewal of the Catholic Church. Pope Francis extends this position by referring to the popular piety of the people as an evangelizing tool. What both promote is engagement with the poor, not from a charitable position but from a place of solidarity. When Saint Oscar Romero began engaging with the poor, he shifted his epistemic position

84 EG, # 255.
and a new knowledge and understanding emerged. Without ever threatening Church doctrine he experienced a transformation of orthodoxy. Romero taught the Church that its collective conscience must constantly be pricked by the world’s poverty and that the response to this poverty must be based on solidarity rather than generosity. An encounter with the poor must focus on listening and transformation rather than the maintenance of a Church that excels in charity but is not willing to be poor itself.

**Laudato Si’ (LS) (2015)**

*Laudato Si’* is a social encyclical that expresses willingness to dialogue with other faiths and philosophies in an attempt to respond to the ecological and social problems of the day. The document promotes an integral ecology. Pope Francis declares that the abandonment of the earth is comparable to the mistreatment of the poor and seeks to illustrate the correlation between the treatment of the poor and the fragility of the planet. There are regular references to the protection and consideration of the poor, as well as encouragement to pursue the common good. The document states that if we regard nature as a source of profit we will overlook that it is in fact the “patrimony of all humanity and the responsibility of everyone.”

*Laudato Si’* relates economics to ecological responsibility and poverty and argues that the solution to the problem of global hunger is not the current global approach of an unending market growth. “Is there an infinite and unlimited growth which proves so attractive to economists, financiers and experts in technology? It is based on the lie that there is an

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85 LS # 63.
86 LS # 2.
87 LS # 6.
88 LS, # 82.
89 LS, # 95.
infinite supply of the earth’s goods, and this leads to the planet being squeezed dry beyond every limit.”\textsuperscript{90} Pope Francis had already mentioned in EG that the fragile environment was defenceless against a philosophy that deifies the market.\textsuperscript{91} Vulnerable people and a vulnerable planet have no voice in the economic decisions that affect them. “There are too many special interests, and economic interests easily end up trumping the common good and manipulating information so that their own plans will not be affected.”\textsuperscript{92}

The Pope is blunt in his assessment of unbridled economic growth. It is not aimed at the common good;\textsuperscript{93} it pollutes, causing premature death, especially among the poor,\textsuperscript{94} and increases economic migration.\textsuperscript{95} The unsanitary water to which so many poor are subject is described as a violation of human rights:

\begin{quote}
Access to safe drinkable water is a basic universal right, since it is essential to human survival and, as such, is a condition for the exercise of other human rights. Our world has a grave social debt towards the poor who lack access to drinking water, because they are denied the right to a life consistent with their inalienable dignity.\textsuperscript{96}
\end{quote}

The integral ecology expressed in the encyclical speaks of a communion with nature that must be matched with tenderness toward our fellow human beings. All ecological initiatives need to respect the social ramifications of their proposals and take into account the fundamental rights of the poor\textsuperscript{97} for only this approach is in keeping with the Church’s understanding of a preferential option for the poor. Strategies that combat poverty and

\textsuperscript{90} LS, # 106.
\textsuperscript{91} EG, # 56.
\textsuperscript{92} LS, # 54.
\textsuperscript{93} LS, # 18.
\textsuperscript{94} LS, # 20.
\textsuperscript{95} LS, # 25.
\textsuperscript{96} LS, # 25.
\textsuperscript{97} LS, # 89-93.
simultaneously protect nature are required. In order to realise this goal, LS promotes the principle of subsidiarity: “Let us keep in mind the principle of subsidiarity, which grants freedom to develop the capabilities present at every level of society, while also demanding a greater sense of responsibility for the common good from those who wield power.”

Subsidiarity is a principle of CST that promotes local people to have some form of self-determination and adjudge what is most appropriate for their environment. “Unless citizens control political power – national, regional and municipal – it will not be possible to control damages to the environment. Local legislation can be more effective, too, if agreements exist between neighbouring communities to support the same environmental policies.”

*Laudato Si’* argued that a lack of concern for the poor and the environment is a postmodernist disease amplified by individualism and consumerism. A cultural change is necessary and the pursuit of the common good and a preferential option for the poor would be an important step toward this change. Christian spirituality offers an alternative to obsessive consumption and Christianity needs to play a role if individualism and consumerism are to be overcome. “All Christian communities have an important role to play in ecological education. It is my hope that our seminaries and houses of formation will provide an education in responsible simplicity of life, in grateful contemplation of God’s world, and in concern for the needs of the poor and protection of the environment.” LS states: “We have to realise that a true ecological approach always becomes a social

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98 LS, # 139.
99 LS, # 196.
100 LS, # 179.
101 LS, # 222.
102 LS # 214.
approach; it must integrate questions of justice in debates on the environment, so as to hear both the cry of the earth and the cry of the poor.”

Henry Longbottom SJ believes that LS represents a shift in ethical thinking in CST from duty bound ethics to a virtue ethical approach. The call for “ecological conversion,” he argues, is dependent upon a cultural shift regarding the ecology rather than a more responsible stewardship of our duties. “If we are going to undergo the type of ‘ecological conversion’ that LS calls us to embrace, it is going to be driven by a desire to become better, more compassionate people, rather than feeling that we ought to do our bit for the environment.” The analogy Longbottom uses is that of an oil company responsible for a damaging oil spill. The company is charged for its failure to fulfil its minimal legal duty of care, not for its lack of love for nature. It is the latter that the Pope is challenging us to move toward.

*Laudato Si’* speaks of the intrinsic value of all living things rather than our responsibility to protect them and understands life as interwoven with nature rather than controlling it. “Everything is related, and we human beings are united as brothers and sisters on a wonderful pilgrimage, woven together by the love God has for each of his creatures and which unites us in fond affection with brother sun, sister moon, brother river and mother earth.”

Longbottom does not explore how moving from duty ethics to virtue ethics can augment our response to the poor but I believe it provides a suitable framework. The Church’s historical response to the poor has been marked by commitment and sacrifice, but has the

103 LS # 49.
105 LS, # 92.
underpinning motivation been one of Christian charity, social justice or love? A Church of the poor is not one that looks at responding to poverty out of a sense of duty. It is a Church that is transformed by the suffering of our brothers and sisters whom we love. By virtue of the Church being willing to allow the poor to affect it, it provides the poor with a sense of contribution and dignity, rather than being recipients of other people’s charity. This ideal is not one which dismisses the need for responsibility and duty. The journey toward authentic solidarity may begin from a dutiful position and an ethic of Christian responsibility may lead people to engage with poverty, but it is via the experience of this engagement, which, over the course of time, people can come to love those whom they serve. In a Church of the poor, duty must lead to love because love is the true path of solidarity.

A final but important component in LS is the innumerable references to Bishops’ Conferences from all parts of the world. A greater respect for Bishop’s Conferences decentralises the Church and gives episcopates and their people a sense of autonomy. In Chapter One I referenced an article by Mary Elsbend titled Whatever Happened to Octogesima Adveniens in which the author laments the lack of respect shown by Church authorities to local communities. Pope Francis seeks to rectify this problem and sees the work of Bishop’s Conferences as a concrete example of internal Church subsidiarity. There are sixteen Bishops’ Conferences quoted in LS and I will revisit this important component of the Francis Papacy later in the thesis for it is one of the ingredients that I believe can contribute to the resuscitation of the teaching on the preferential option for the poor.

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106 See page 60.
107 There are references to Bishop’s Conferences in South Africa, Philippines, Bolivia, Germany, Argentina, USA, Canada, Japan, Brazil, Dominican Republic, Paraguay, New Zealand, Australia, Portugal, Mexico and the CELAM Conference in Apercidia.
Not all elements of society and the Catholic Church were enamoured with the Pope’s ecological integration. American Catholic writer George Neumayr states: “The Vatican under the frenetic political activism of Pope Francis has become a nest of extreme environmentalists. Operating almost like an annex of Greenpeace and the Sierra Club, Francis has held a series of conferences and events that promote the rawest and most aggressive theories of climate change.”\(^{108}\) Neumayr is a global warming sceptic and believes the Pope has turned a political dispute into a moral crisis. He says that the document is part Marxist, “riddled with half-truths” and anti-capitalist.\(^{109}\) According to Neumayr, \(\text{LS}\) is representative of a Pope deviating from his prime directive of saving souls:

In his attempt to pressure Catholics into embracing the radical green movement, Pope Francis is creating needless divisions within the Church, handing a propaganda tool to her moral enemies, and exposing the Church to future embarrassment when the “science” behind global warming claims is discredited, Where other popes sought to save souls, he prefers the more fashionable cause of “saving the planet.”\(^{110}\)

Neumayr seems to have completely missed the point that the Pope is attacking greed, individualism and consumerism, and that it is these anti-evangelical practices that are harmful to people’s souls, the poor and the environment. Pope Francis is trying to encourage a Christian thinking and practise which seeks to uphold the dignity and purpose of all creation and although this begins with the poor it includes the environment.

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\(^{109}\) Ibid., 105-6.

\(^{110}\) Ibid., 119.
Part IV: The Francis Reformation: A Challenge to the Church and Global Society

Commentators from outside and within the Catholic Church have attacked both the social and doctrinal legitimacy of Pope Francis’ “transformation of orthodoxy.” Despite the fact that the Pope is not a liberation theologian, many of his opponents have employed the language that denounced the initial stages of the theologies of liberation. Accusations of Marxist tendencies and the politicisation of the Gospel are common in the rhetoric of the Pope’s detractors. Ultimately, what I find is that the Pope’s writings remain faithful to the Gospel and to the principles of CST.

There appears a historically familiar pattern of opposition to Pope Francis’ ecclesial renewal. Despite her theological and liturgical conservatism, Dorothy Day was accused of being a communist and was asked to drop the word Catholic from her newspaper. Saint Oscar Romero was branded by Church and government officials as a Marxist sympathiser and a divisive element in the Church. Dom Helder Camara’s famous statement of being called a saint when I give food to the poor and a communist when I ask why the poor have no food is a historical truth at an ecclesial and global level. Pope Francis now deals with the same accusatory rhetoric.

Pope Francis is recalling a consistent theme of CST when he describes the dominant neoliberal economic model as anti-evangelical. It is a system that not only undermines the poor and their local cultures, it also directs and nurtures people toward radical individualism.

In the sociocultural realm, our globalized world tends to render us incapable as agents, that is, it relativizes the absolute value of people and their cultures and thus suppresses the diversity that gives human relevance and meaning to everyday life. New subcultures of indolence arise, fostering
dehumanization to the point of rejection of anyone who is not in tune with the dominant system and its pursuit of monetary greed.\textsuperscript{111}

Pope Francis is not dismissing globalisation per se; it is the current trajectory of globalisation that he believes is damaging solidarity between peoples.

We need to move toward an alternative type of globalization, one that is polycentric, that recognizes the peripheries and from them can build new modes of relationships between the global and the local. Such a model will enable new relationships of interdependence between persons, cultures, and states, not on the basis of new forms of colonialism, but rather on the basis of bonds of mutual solidarity and reconnection.\textsuperscript{112}

Pope Francis argues that present day globalisation has contributed to a world in which the value of human life is lost. His concerns regarding the effects of the “imperialism of money” in neoliberal capitalist ideology has a long precedence in CST. Pope Pius XI condemned it in the 1931 encyclical \textit{Quadragesimo Anno} and Pope John Paul II described his concerns in 1993.

Catholic social doctrine is not a surrogate of capitalism. In fact, although decisively condemning “socialism,” the church since Leo XIII’s \textit{Rerum Novarum}, has always distanced itself from capitalistic ideology, holding it responsible for grave injustices (cf \textit{Rerum Novarum}, 2). In \textit{Quadragesimo Anno}, Pius XI, for his part, used strong words to stigmatize the international imperialism of money \textit{(Quadragesimo Anno}, 109). This line is also confirmed in the more recent magisterium, and I myself, after the historical failures of communism, did not hesitate to raise serious doubts on the validity of capitalism, if by this expression one means not simply the “market economy” but 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 \textit{(Centesimus Annus}, 42).\textsuperscript{113}

Liberation theologians had spoken about the exploitation of the poor. But Pope Francis uses language that extends beyond exploitation and refers to the poor as being “surplus” and

\textsuperscript{111} Rafael Luciani, \textit{Pope Francis and the Theology of the People}, xvii.
\textsuperscript{112} Ibid., 30.
“disposable.”

Liberation theologians and Pope Francis are adamant that such a system mutes the cry of the poor. The teaching on the preferential option for the poor seeks to ensure that the poor not only have a voice in the Church but also in society.

Pope Francis was elected at a time in history which has seen the rapid diminishment of Marxist/Socialist ideology and the continued expansion of Capitalism. In 1891 when Pope Leo XIII published *Rerum Novarum*, the Church’s greatest fear was the rise of Marxist-Socialism. This fear continued to mark the history of CST. However, CST, has also consistently opposed the excesses of capitalism, so with one “threat,” for the time being at least failing, what will the future of CST and more specifically the preferential option for the poor be in a world dominated by capitalism?

*Evangelii Gaudium* calls for economic policies that respect the dignity of all people. The document states that an economy that maintains and expands inequality kills, and that in such an economy human beings become consumer goods and therefore disposable. The Pope’s rhetoric is blunt but it also echoes the concerns expressed by Pope John Paul II in the 1983 encyclical *Laborem Exercens* which reminded the world that people were not consumer goods and that work was for the benefit of people rather than the accumulation of profit. Pope Francis in an even stronger statement says: “Money must serve, not rule. The Pope loves everyone, rich and poor alike, but he is obliged in the name of Christ to remind all that the rich must help, respect and promote the poor. I exhort you to generous

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114 *Evangelii Gaudium* # 53 says: Human beings are themselves considered consumer goods to be used and then discarded. We have created a “disposable” culture which is now spreading. It is no longer simply about exploitation and oppression.

115 EG # 203.

116 EG # 53.

solidarity and a return of economics and finance to an ethical approach which favours human beings.”¹¹⁸

The Pope sees the elimination of unjust social structures as part of the mission of the Church¹¹⁹ and alludes to the idea that injustice is an evil that can quietly spread and undermine any political and social system.¹²⁰ The resolution of structural injustice is not just for the poor but for all of society. It is society as a whole that needs to be cured of its selfishness because this selfishness is leading the world to new crises.¹²¹

The preferential option for the poor is an option that starts with the poor and leads to historical projects that improve their physical reality; in this way theology and economics are linked. What Pope Francis observes is the powerful creating a system that leaves many people as “disposable,”¹²² and an autonomous marketplace¹²³ that cannot be trusted.¹²⁴ “After making a searing critique of trickle-down economics in his first major document as pope, he would be accused of being a Marxist by some conservatives in the US. “Marxist ideology is wrong” he told a journalist, but, “I have met many Marxists in my life who are good people, so I do not feel offended.”¹²⁵ The Pope’s response to this criticism echoed that of Dorothy Day who suffered the same accusation over fifty years earlier.¹²⁶

¹¹⁸ EG, # 58.
¹¹⁹ EG, # 188.
¹²⁰ EG, # 59.
¹²¹ EG, # 202.
¹²² EG, # 53.
¹²³ EG, # 56.
¹²⁴ EG, # 204.
¹²⁵ Austen Ivereigh, The Great Reformer, 37.
¹²⁶ “I can say with warmth that I loved the Communists I worked with and learned much from them. They helped me to find God in His poor, in His abandoned ones, as I had not found Him in Christian churches ... My radical associates were the ones who were in the forefront of the struggle for a better social order where there would not be so many poor.” (James H. Forest, Love is the Measure (NY: Paulist press, 1986), 128.
The Pope and His Critics

The neo-conservative elements in the USA were the most publicly vocal opponents of *Evangelii Gaudium*. Broadcaster Rush Limbaugh referred to it as pure Marxism. The American Tea Party, Fox News, Forbes Magazine, and Sarah Palin joined in a chorus of opposition. All accused EG of a Marxist bias. What the critics chose to ignore was that the Pope’s concerns revolve around an autonomous market economy harming the poor and the planet; that this is an economy that nurtures greed, individualism and consumerism. All of which are contrary to the Gospel, as well as to the principles of the common good, solidarity, subsidiarity and the preferential option for the poor.

Prominent Catholic neo-conservative commentator Michael Novak offered a more sober critique of EG, but it concluded with a patronising tone calling Pope Francis back to a more conservative position. Writing for the *National Review* he says: “But reading the exhortation in full in its English translation and reading it through the eyes of the professor-bishop-pope who grew up in Argentina, I began to have more sympathy for the phrases used by Pope Francis.”

Novak had been an outspoken critic of liberation theology and an influential architect in marrying Catholic social thought with Reagan style economics. Pope Francis, Novak argues, needs effective advisors to lead him to the position that Pope John Paul II had taken. “If in Vatican II, Rome accepted America’s ideas of religious liberty, in *Centesimus Annus*, Rome has assimilated American ideas of economic liberty.” While there is no question that CA endorsed a particular style of capitalism there were enough conditions

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128 In an earlier chapter I had spoken of the alliance between the Vatican and CIA during the Regan era to combat the spread of communism in Latin America. Tragically a by-product of this affiliation saw Church women and men murdered, tortured and oppressed. (See pages 64-65)
within the definition to suggest that Pope John Paul II would have been concerned with the trajectory that neo-liberal elements in America were promoting for the global economy.

George Neumayr’s book, *The Political Pope* is a damning assessment of Francis’ Papacy. The book is venomous and a summary of the first chapter will suffice to offer a flavour of its content.

- The book commends Pope’s John Paul II and Benedict XVI for their anti-communist stance.⁷⁰
- Condemns liberation theology as Marxist-inspired ideology disguised as concern for the poor.
- Claims the KGB controlled the World Council of Churches.
- Claims that the KGB infiltrated the Medellín Conference.
- Opposes the recognition that the Pope has bestowed on Gustavo Gutiérrez.
- Claims that Pope Francis has diluted the Church’s doctrinal and theological position.⁷¹
- Ranks Pope Francis as low as former president Barack Obama and academic Cornel West.⁷²

Neumayr states: “To hear Pope Francis speak today, one might conclude that no-one can be at the same time a good catholic and an opponent of socialism.”⁷³ He describes EG as full of left-wing clichés and lacking in doctrinal emphasis. “Though ostensibly an exhortation, this document said nothing about the necessity of belief in Jesus Christ for salvation and spoke of missionaries more like celibate social workers than transmitters of the Catholic faith.”⁷⁴

The book concludes: “How did it come to this? How did the papacy go from safeguarding

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¹° The confrontational nature of the book is highlighted in the opening paragraph with the public humiliation of a “cowering” Ernesto Cardenal by Pope John Paul II. Cardenal was a Catholic priest who was part of the Sandinista Government in Nicaragua in the 1980s. The fact that the Pope needed to have stern words with Cardenal is not disputed but the manner in which it was done was unnecessarily confrontational.

¹¹ Neumayr quotes Cardinal Raymond Burke, Bishop Athanasius Schreider of Kazakhstan and Bishop Thomas Tobin of Providence Rhode Island to support this claim.

¹² “His program of promoting left-wing politics while downplaying and undermining doctrines on faith and morals has turned him into the ecclesiastical equivalent of Barack Obama.” Pope Francis is a gift from heaven,” the radical academic Cornel West said to *Rolling Stone*, 11.

¹³ Ibid., 9.

¹⁴ Ibid., 27.
doctrinal unity to shattering it? How did it go from fighting a sinful world to joining it? How did it go from a spiritual bastion to a partner of the UN and a pagan political order?\textsuperscript{135}

It is difficult to respond to such rhetoric but as is the case with the American neo-conservative movement it is hard for a non-American to distinguish their faith from nationalistic and ideological tendencies. One certainty is that the starting point for Neumayr and his fellow neo-conservatives is not the poor.

Despite the different historical realities, there are some interesting parallels between the critics of Pope Francis and the critics of the initial advocates of liberation theology. Liberation theologians had originally sought to break the alliance that had formed between the Church and the powerful in Latin America. While the theology displayed connections to socialism, it was also accused of politicising the Gospel, fomenting class warfare and creating divisions within the Church. Pope Francis believes that an evangelisation that does not display a concrete concern for our vulnerable brothers and sisters is reducing, not politicising the Gospel and ultimately it is solidarity, not division that he and the Church is seeking.

The accusations from the neoconservative elements within the Catholic Church regarding the Pope’s politicisation of the Gospel are particularly galling. Their combined political, theological and economic agenda has sought to influence politics to ensure their ideology is safeguarded. The history of Latin America has seen Catholics fighting on both sides of the political divide but it is only the left, the Gutiérrez’s and Romero’s of the Church who have apparently “politically” the Gospel.

\textsuperscript{135} Ibid., 231.
Evangelii Gaudium states: “Just as the commandment “Thou shalt not kill” sets a clear limit in order to safeguard the value of human life, today we also have to say “thou shalt not” to an economy of exclusion and inequality. Such an economy kills.” This provocative statement became the title of a book which explains the way Pope Francis understands the relationship between neoliberal capitalism and social justice. The Pope attacks the current market economy from both a theological and ethical perspective. It is not capitalism per se under attack but a neoliberal form of capitalism. It is this particular expression of capitalism which Pope Francis believes contributes to idolatry of money, and this idolatry has theological connotations because it results in a distancing from God and a diminishing concern for our sisters and brothers.

The Great Depression (1929-1939) was a pivotal influence on Pope Pius XI’s 1931 encyclical Quadragessimo Anno. This document spoke of an economic system which allowed for the strongest or most violent to survive and bemoaned the imperialism of money. Pope Francis experienced the severe recession in Argentina (2001) during his time as Archbishop of Buenos Aires and wrote EG at a time when the world was still recovering from the global financial crisis of 2007/8. While the Pope’s critics may have focussed on his perceived alliance with Marxism, what the Pope initiated was an anxiety surrounding the perceived alliance between the Church and capitalism, which neoconservatives argued was supported in Centesimus Annus. “An anxiety emerging from the election of the pope who is reaffirming the social doctrine of the church and whose words seem to call into question the

136 EG # 53.
137 Andrea Tornielli and Giacomo Galeazzi, This Economy Kills (Collegeville, Minnesota: Liturgical Press, 2015).
138 Pope Pius XI, Quadragessimo Anno # 109.
139 Pope John Paul II, Centisimus Annus, # 42.
supposed “holy alliance” with certain forms of capitalism, which many thought was by now indisputable.”

There were other commentators and economists far more supportive of EG. Among them was the former banker and chair of the Vatican’s Institute for the Works for Religion Ettore Gotti Tedeschi. Tedeschi reminds people that Pope Francis is not opposing capitalism but rejecting an economy of exclusion that leads to ignoring the needs of our neighbour. Alternatively, what the Pope is seeking is an economy that contributes to solidarity. Rather than being an argument regarding Marxism, Socialism or Capitalism, it is an attack on the real enemies of society which are individualism, consumerism, nihilism and relativism. The Pope and Tedeschi are challenging neoliberal proponents to critique their ideology and ask whether they are contributing to the greed, individualism, consumerism, nihilism and relativism evident in their society.

In relation to the neoconservative movement Tedeschi is undiplomatic:

They seem to me dictated by the urge to be at the centre of attention, a lack of humility, a certain way of doing, typical of the competitive American Catholic Puritanism, rather than by the desire to help improve Catholic thinking on certain issues. Besides, the specific contradiction of capitalism that gave rise to the current crisis started in the United States, not in Rome; but I do not remember reading heartfelt warnings sent by neoconservatives to the U.S. government.

The Catholic neoliberal movement in America is a very powerful group and in a recently published article by Massimo Faggioli, the author expresses the opinion that big money donations are an “insidious threat to the Church’s freedom.” He explains that in a world

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140 Andrea Tornelli and Giacomo Galeazzi, This Economy Kill: Pope Francis on Capitalism and Social Justice (Collegeville, MN, Liturgical Press, 2015), xiii
141 Ettore Gotti Tedeschi, “Social Doctrine in a World Governed by Financial Technocrats,” in This Economy Kills, 123
with an unprecedented concentration of wealth in increasingly fewer hands and where money has the power to supersede political power, there are some wealthy Catholics who through their money are seeking to influence the Church’s governing bodies. Donations from right-wing Catholic billionaires to the Church are coming with ideological strings attached. Ideologies that Faggioli claims represent a libertarian economic perspective that is in direct opposition to CST. “That blessing of the current system of capitalism is coated with a neo-traditionalist theology, often with clear anti-intellectual tones and a neo-devotional focus, which is preparing an intellectual disaster for the younger generations of Catholics.”¹⁴² These donors are trying to save the Church from “corruption” but it is their definition of the “Church” and their definition of “corruption” they are defending. These donations are representative of an ideology expressed by George Neumyar and are politically charged. Faggioli is adamant that the Church should be reluctant to accept money that represents special interests, because these interests contain their own political, theological and economic agenda.

What Pope Francis is attempting to do is break the concordat between neoliberal capitalism and Church social thought because this is an unhealthy alliance with the powerful. He wants a Church that is more closely aligned with those living in the frontiers of discomfort; a Church not beholden to the generosity of the rich. “The poor are no longer waiting. You want to be protagonists. You get organised, study, work, issue demands and, above all,

practice that very special solidarity that exists among those who suffer, among the poor, and that our civilization seems to have forgotten or would simply prefer to forget.\textsuperscript{143}

**Part V: Gustavo Gutiérrez and an Unlikely Alliance**

Gustavo Gutiérrez continues to offer his own theological reflections on liberation theology and the preferential option for the poor and in 2015 co-authored a book titled *On The Side Of The Poor*.\textsuperscript{144} The uniqueness of this book is that its co-author was the Prefect for the Sacred Congregation of the Doctrine of the Faith (SCDF), Cardinal Gerhard Ludwig Muller. Given the historical relationship between liberation theology and the SCDF this is a significant shift in the Vatican/liberation theology relationship. It was the former Prefect Cardinal Ratzinger who orchestrated a campaign to diminish the effectiveness and spread of liberation theology throughout the 1980’s and beyond. Cardinal Muller is widely regarded in the Catholic Church as a leading conservative voice but in relation to Gutiérrez and liberation theology he has been a vocal supporter.\textsuperscript{145}

In the book Cardinal Muller defends the orthodoxy and efficacy of Gutiérrez’s theology. Both authors offer reasons to reject the neoliberal style of governance and economics that has become increasingly powerful in today’s world. Cardinal Muller described liberation theology as a significant contribution to Catholic theology and a stimulus for European


\textsuperscript{145} In 2018 Cardinal Muller was in Australia as a speaker to the conservative clerical organization, the Confraternity of Catholic Clergy. In an interview in *The Australian* newspaper he critiques Pope Francis and alludes to the Pope’s focus on social justice and the alleviation of poverty as superseding that of doctrinal clarity. He also claims that Christians were under no obligation to follow Pope Francis’ “green-left agenda” and emphasised that the Church was not a “green party”. Environmental policy he said has nothing to do with faith and morals. (Tess Livingstone, *The Weekend Australian*, July 28-29, 2018).
theology. He acknowledged that its origins were in a divided Church, one in which the Church hierarchy and the majority poor of Latin America were not in solidarity.

Muller argued that one of liberation theology’s contributions to the theological narrative is its convergence of theory and practice. “The differentiation between theory and praxis, between theoretical theology and practical theology, is now impossible.” For Muller praxis is defined as a person’s “holistic encounter with reality” and begins a process that leads to an active collaboration with God’s liberating love:

This movement that begins with praxis is, however, nothing other than the classically grasped relationship of faith and love. In faith, someone fully orients himself or herself to God’s self-communicating love. As a result, this individual participates in a collaborative manner in God’s active and liberating love of all human beings.

Muller asserts that liberation theology not only re-established the mission of the Church but assisted in the creation of a more just society. “Church work is an instrument that both directs people to God but also to union among themselves. A historically constituted Church sees the continuing principle of human history as one where a society befitting human beings is constructed.”

Under the leadership of the then Cardinal Ratzinger, the Magisterium’s 1984 publication *Instruction on Certain Aspects of the Theology of Liberation* contained an attack on what it viewed as the failings of the Basic Ecclesial Communities (BECs), but Muller offers a spirited defence. “Base is not used here in opposition to the hierarchy. It means that the

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146 Muller, *On The Side Of The Poor*, 11.
147 Ibid., 15.
148 Ibid., 61.
149 Ibid., 61.
150 Ibid., 62.
151 Ibid., 14.
152 See pages 79-80.
community as a whole – with its inner composition and the emergence of differing charisms, services, and offices – becomes the personal subject of liberating actions and the historical praxis of liberation.”\textsuperscript{153}

Historically the most consistent and ardent criticisms of liberation theology were its utilisation of Marxist analysis and its ties to socialism. Cardinal Muller says that liberation theology is fundamentally different from Marxism because unlike Marxism which views the human person as a “product and composite of his or her material conditions,”\textsuperscript{154} liberation theology believes the human person is a creation of God. All people are called to engage in, and therefore shape, the social and economic realities of human existence. It is, however, his radical description of the connection between Marxism and liberation theology that challenges the traditional suspicion associated with the Marxist elements in the theology:

People should not be suspicious of liberation theology in all of its forms because of its use of Marxist ideas. Instead, they should investigate Marxism as an appropriation and secularization of the basic conviction of the Christian theology of history and eschatology. It would be worthwhile to discuss the extent to which liberation theology is the rediscovery of original Christian ideas that are evident when one is able to avoid Marxism’s onerous vocabulary.\textsuperscript{155}

This quote contains elements of Dorothy Day’s approach to communists. Dorothy never forgot that they, unlike many Christians, were at the forefront of representing the poor in America and therefore displayed traits that the gospels demanded.

Given the historical relationship between the SCDF and liberation theology it is a seismic shift to see both the Pope and the Prefect of the SCDF\textsuperscript{156} being sympathetic to and

\textsuperscript{153} Muller, \textit{On The Side Of The Poor}, 63.
\textsuperscript{154} Ibid., 66.
\textsuperscript{155} Ibid., 78.
\textsuperscript{156} Cardinal Muller was removed from his position as Prefect in 2017.
supportive of liberation theology. Of greater significance is whether this will influence the
teaching on the preferential option for the poor.  

One aspect on which both authors are in agreement is the dangers inherent in neoliberal ideology. They express concern at the
growth of neoliberal ideology throughout the world, which they claim has not benefitted the poor.

Gutiérrez believes that neoliberalism is an ideology that has distanced itself from the relationship between politics and ethics and as a result separates rather than unifies the world.

We should not lose sight of the fact that the strongest rejection of neoliberal positions begins with the contradictions of an economy that cynically, and in the long run suicidally, forgets about the human being. In particular it forgets those who are defenceless in this field; today that means the majority of humankind.

Gutiérrez and many other liberation theologians regarded socialism as an appropriate alternative to the capitalism evident in Latin America throughout the 1960s-1980s. Their suggested alternative proved to be inadequate. This does not however mean that unbridled capitalism should be the choice of economic model. Gutiérrez and now Pope Francis reject the parallelism between Christianity and neoliberalism because neoliberalism leads society toward a radical individuality that threatens human solidarity. “Envy, selfishness, and greed become the driving force of the economy, solidarity and concern for the poorest are seen, by contrast, as obstacles to economic growth and in the end as counter-productive in achieving a situation of well-being from which all persons might benefit one day.”

157 Cardinal Muller describes the preferential option for the poor as a central perspective of liberation theology and one that has profoundly shaped the Church in Latin America. (On The Side Of The Poor, 27).
158 Gutiérrez, On The Side Of The Poor, 50.
159 Ibid., 97.
Pope John Paul II had spoken of the “idolatry of the market”\textsuperscript{160} and Gutiérrez believed that neoliberal ideology turns the market and profit into an idol. Gutiérrez wants to remind the advocates of neoliberalism of the Catholic doctrine of the “universal destination of goods.”\textsuperscript{161}

In the face of an economic order presented as the natural order which regulates itself – controlled by the famous “invisible hand” – for the benefit of all, which makes profit and consumption an unconditional motor of economic activity, which pillages the earth and is in search of places to deposit industrial waste, the assertion of the universal purpose of the goods of this world must be further examined and deepened.\textsuperscript{162}

Catholic Social Teaching argues that politics contributes to the common good when it recognises the value of all its citizens and displays a special concern for the most vulnerable. This contribution becomes distorted when politics itself is subject to the absolute autonomy of the market. For Pope Francis, a political system subject to the market dismisses humanity and more pertinently the vulnerable as its centre and destroys the common good:

As long as the problems of the poor are not radically resolved by rejecting the absolute autonomy of markets and financial speculation and by attacking the structural causes of inequality, no solution will be found for the world’s problems or, for that matter, to any problems. Inequality is the root of social ills. We have to question the absolute autonomy of the market and refocus on the dignity of each person and the pursuit of the common good.\textsuperscript{163}

The anthropology contained within CST highlights the social nature of the human person and it is in community we grow in moral maturity and learn how to grow close to God and each other:

\textsuperscript{160} Pope John Paul II, Centesimus Annus, # 40.
\textsuperscript{161} The Catholic Church regards the “Universal Destination of Goods” as an important component of Catholic Social Teaching. It states that God intended all the goods of the earth for all peoples. Everyone should have the necessary goods they require to sustain life. People and nations do not have the right to squander goods when others are denied access to them.
\textsuperscript{162} Gutiérrez, On The Side Of The Poor, 127.
\textsuperscript{163} EG # 202-204.
The common good is realised through solidarity; with the awareness that nothing that is ours is truly our own, but it has been given to us, and we should put it to good use. The common good is realised with a form of caring and loving solidaristic individualism, as the one outlined by the social doctrine of the church that is the basis of a catholic capitalism capable of reconciling freedom and solidarity.\textsuperscript{164}

\section*{Summary and Transition}

The preferential option for the poor is a Gospel prerogative that should influence economic policies and political systems. The poor are not at the heart of the market economy and the argument that increasing wealth will eventually trickle down to the poor still does not place the poor at the centre. Those who place their faith in a market economy have favoured an entity that does not nurture solidarity, but rather, encourages greed and individualism and is therefore contrary to Christian values. “Human advancement is closely connected with evangelisation, because to evangelise means to take care of the needs of others, to be close to others, and to share the suffering of others. To be insensitive to their needs excludes us from God’s plan.”\textsuperscript{165}

Can an economic and financial system which nurtures idolatry of money, individualism and consumerism assist in the formation of a people who advocate the principles of the common good, solidarity, subsidiarity and a preferential option for the poor? Pope Francis says no. The autonomous market economy defended by the neoconservatives begins from the rich and powerful because they have a greater say over its direction; in fact its “autonomy” is a myth. An argument may indeed be formulated to suggest that wealth creation will ultimately benefit the world’s poor but is there a timeframe for the poor to

\begin{itemize}
\item \textsuperscript{164} Tornielli and Galeazzi, \textit{This Economy Kills}, 127.
\item \textsuperscript{165} Ibid., 43-44.
\end{itemize}
share in the spoils? This is not a capitalist versus communist argument; this is a theological argument about what environment is best suited to orient people toward a love of their neighbour. Pope Francis is making a theological choice. “In the poor, Francis sees the presence of Jesus. To carry out his mission, Francis starts from the poor in a very concrete and not ideological way, and in doing so lashes out against the economic, political, and social systems with prophetic power.”

Pope Francis respects the knowledge of local Churches and implores them to find ways to respond to his universal edict to become closer to the poor. The methodology and implementation of the exhortation can be determined locally. EG is in clear continuity of CST making regular references to previous documents and highlighting the importance of the traditional principles of Catholic social doctrine.

Pope Francis, reiterating what was stated by Paul VI in Octogesima Adveniens (1971), reminds us that the church is no longer able to say a valid and appropriate word for all the different and complex situations that arise in various parts of the world. For this reason, not only are references made to what has already been written by previous popes but also to documents of regional and national episcopal conferences from all continents.

It is clear that the global economic landscape has significantly changed. “In 1980 the global financial assets were equal to the world GDP (USD 27 trillion). In 2007, on the eve of the outbreak of the crisis, it had increased to USD 240 trillion against the USD 60 trillion of GDP – four times more. And at present the gap has become even larger. I do not think that an expression such as an international imperialism of money is exaggerated.” Those Church people faithful to the principles of CST are vocal in their concerns regarding the current marketplace. “Too much of the nation’s time, talent and treasure” has been spent gambling

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166 Ibid., 92
167 Tornielli and Galeazzi, This Economy Kills, 32
168 Stefano Zamagni, “Capitalist Economy and Civil Market Economy,” in This Economy Kills, 135.
on the financial markets for short term gain, and too little was spent on improving the real purpose of business, making goods and services that promote economic well-being.\textsuperscript{169}

Initial attempts by some liberation theologians to connect theology with socialism failed and I believe Pope Francis is arguing that aligning neoliberal economics with Christianity will suffer the same fate. The history of CST has clearly avoided any correlation with the major political ideologies and for Pope Francis neither ideology is commensurate with the principles of CST, or with the Gospel. The principles of CST need to be promoted within the context of all social orders as the goal is to improve the well-being of all peoples, especially the poor. To this end Pope Francis has not deviated from Catholic social thought. EG’s unique contribution to the Church is its call for the Church to truly become a Church of the poor; a Church that is intimately connected to the first addressees of Jesus’ message. Pope Francis is accepting of a Church that is vulnerable because this is a Church in need of God’s grace; this is a Church that is poor and poor in spirit – one reliant on God and one another.

When reading the commentaries of some of the American neoconservatives I sense they are asking the Church to set aside most aspects of CST and trust in their version of American capitalism. In essence, they believe that the poor will ultimately benefit from an autonomous market because that model is best placed to create wealth. They know that individual Christians have a duty to assist the poor and are probably very generous in doing so, but despite their advocacy of a few lines in CA they believe neoliberal capitalism, not CST is the most appropriate directive for global development and human flourishing.

The influential Jacques Maritain spoke of the benefits of the democratic system but he warned against its potential for individualism and inequality. In CA # 42 Pope John Paul II

\textsuperscript{169} Clark and Alford, \textit{Rich and Poor}, 58
promoted the potential of capitalism but concludes that it must be accompanied by a strong judicial and ethical framework. One wonders what Maritain and Pope John Paul II would have made of the global financial crisis and the current state of the global economic order. Pope Francis is simply stating that their concerns rather than their hopes have been realised.

Pope Francis has sought an internal reformation of the Church by advocating an ecclesial transformation. But his desire for a Church of the poor has ramifications outside Church parameters as this is a Church that will continue the tradition of seeking to protect and then promote the world’s most vulnerable peoples. The Pope may have denounced the dominant global capitalism of the day but what does he propose in its stead? While the ideology and rhetoric are rich in terms of solidarity and allowing the “periphery” to influence the “core” both in Church and society, I sense there needs to be more. The “see-judge-act” methodology requires action and liberation theologians proposed historical projects. I believe that a Church of the poor will be better placed to engage in these concrete actions/projects (praxis), but I also believe these are crucial undertakings that need further examination. Historical projects are required if the preferential option for the poor is going to be better understood and applied throughout the universal Church.

While I have argued that the aggressive anti-liberation theology policy practised during the papacy of John Paul II adversely influenced the teaching on the preferential option for the poor, I do not regard him as an advocate of neoliberal economics. It was his “doctrinal clarity” and authoritative approach that also attracted support from the neoconservative branch of the Church. Neoconservative and neoliberal ideology attacked liberation theology
and now their stance threatens an ecclesial renewal which advocates the concept of the Church of the poor.

The Medellín Conference and Gutiérrez’s A Theology of Liberation made inroads into understanding what a Church of the poor might entail, and the teaching on the preferential option for the poor, for which they are primarily responsible, is an example of this Church. Ecclesial praxis, biblical renewal, historical consciousness, and the definition of the Church as the “People of God” provided a nurturing place from which revisionist theological reflection could occur. The withdrawal of these nourishing ingredients led to a diminishing influence of liberation theology, a stagnation of the teaching of the preferential option for the poor, and ultimately upon any reflection on the meaning of a Church of the poor. Pope Francis, without necessarily promoting liberation theology, is reviving the teaching because he values the variables that contributed to its formulation.

Pope Francis is offering the Church the opportunity for fundamental reformation; this is an axiomatic transformation of how the people of God understand themselves as Church. Part of this revolution has included the revitalisation of the preferential option for the poor but the difficulty remains as to how, in the midst of external and internal opposition, he will be able to disseminate this renewal and translate it into concrete action? If the Pope wants to lead a transformation of the Church into a “Church of the Poor,” the rudiments for more effective methods of understanding and applying the teaching on the preferential option for the poor must be part of the formation of all the faithful.
Chapter Six

Separating the Teaching on the Preferential Option for the Poor from its Liberation Theology Roots and a Way Forward for the Church: Internal and External Challenges

The previous two chapters were presented in order to illustrate that one does not need to be a liberation theologian to be an effective practitioner of the teaching on the preferential option for the poor. In the Introduction to this thesis I stated that although the teaching stemmed predominantly from liberation theology, it was an acknowledged and accepted teaching of the Catholic Church. Therefore, this teaching belongs not to liberation theology but to all the faithful. Its place is in the Catholic Church. The critique of the magisterium throughout this thesis has been focussed on its failure to understand and effectively apply the teaching throughout the universal Church. It has been my argument that the inability of the magisterium to negotiate effectively, and then incorporate the more fruitful aspects of liberation theology into the teaching has been one of the causes for its stagnation. I have also stated that the Church must continually look for ways to develop and promote the teaching within and outside the Catholic Church. Pope Francis has attempted to do this but as the teaching is now embedded in the Catholic tradition, Pope Francis will not be the last word on its continued evolution.

While there are elements of the key aspects of liberation theology in the ministry and mission work of Dorothy Day, and in the theology of Pope Francis, it is clear that they have avoided the more controversial methods adopted by the early liberation theologians. These theologians utilised the tools of Marxist socialist analyses to generate and then articulate
their understanding and application of the preferential option for the poor. Despite this significant difference, both Dorothy Day and Pope Francis have, and particularly in the case of Pope Francis, continued to be accused of being socialists and communists. It is my belief that a vast majority of these accusers be they Catholic or not, operates from a position that does not prioritise the poor. In the words of Pope Francis: “They do not understand that love for the poor is at the centre of the Gospel.”¹ This is not to say that these people are uncaring or lacking in generosity toward the poor, but that they have been unable to grasp the theocentric nature of the teaching and its call to a more radical form of discipleship. The Catholic opposition to Pope Francis’ agenda need to understand that they are not opposing liberation theology or socialism but rather, Church teaching.

The evidence directs me to believe, that even if the more controversial methods adopted by early liberation theologians are avoided, the teaching on the preferential option for the poor will continue to elicit a hostile response from both inside and outside the Church. Jesus Christ was a historically controversial figure. Believers attempting to follow Jesus faithfully will often be challenged with having to make controversial choices in bearing authentic witness to His life and message. Saint Oscar Romero and Dorothy Day are but two examples. The controversies that accompanied Jesus during His ministry continues to this day and in an ironic twist, the journey of the teaching on the preferential option for the poor, has come to reflect the difficulty of Jesus’ own journey and the journey that the poor experience each day.

The theological methodology that Gustavo Gutiérrez (theologian), St Oscar Romero (pastor), Dorothy Day (spiritual writer and activist) and Pope Francis (pastor) have employed to bear

¹ Cited in Tornielli and Galeazzi, *This Economy Kills*, 102.
witness to their preferential love for the poor includes praxis. A theology of praxis demands concrete engagement with the poor. The commonality of the aforementioned people lies in their commitment to, and engagement with the poor, not their theology. They all share a commitment to liberate the poor via concrete historical projects. Furthermore, what is evident in the lives of all these people is that their own faith, understanding and relationship with God were enhanced by their solidarity with the poor. Gutiérrez called the irruption of the poor into history, an eruption of God into the lives of the non-poor, and these non-poor included the institutional Church. Previously absent voices could now contribute to the Church’s theological, ecclesial and pastoral heritage. Gutiérrez, Romero, Day and now Pope Francis believed in the richness that the poor had to offer the Church; a richness that went beyond presenting them as a noble example of maintaining their faith in the face of suffering.

Despite Pope Francis’ revival of the teaching there remain remnants of an older ecclesial model that continue to prevent the teaching from flourishing. While there are external issues that require negotiation if the teaching on the preferential option for the poor is going to have any influence in the wider world, the starting point for the teachings understanding and application must be the internal machinations of the Church. If the teaching does not take root in the identity and mission of the entire Church it will never be in a position to influence the wider society. Lessons from liberation theology remain relevant but insights from a wide array of theological, ecclesial and scriptural schools will be required if the teaching is going to find its way into the heart of the Church’s identity and mission.
The Internal Challenges of Promoting the Preferential Option for the Poor

Despite the incorporation of the preferential option for the poor into Catholic Social Teaching it did not equate to the teaching flourishing throughout the universal Church. Pope John Paul II favoured an ecclesiology that was more authoritative and centralised than his predecessors, and it has been my argument that this ecclesial style contributed to the teaching’s historical stagnation. I repeat that this critique of Pope John Paul II is in relation to his promotion and advocacy of the preferential option for the poor, not his commitment to, or love of the poor. Chapter Three was titled The Preferential Option for the Poor (1988-2015): From Uncertainty to Stagnation. The basic argument in this chapter was that the theological and ecclesial frameworks that had contributed to the formulation and development of the teaching on the preferential option for the poor had become redundant. In their stead, the teaching operated within an outline that was personalist and an ecclesiology that was centred on magisterial authority. That particular framework proved to be inadequate for the task.

I firmly believe that the teaching on the preferential option for the poor must be couched in a theological rather than ethical framework. This is a teaching founded on God’s revelation as is evidenced in the mission of Jesus Christ. It is a call to discipleship before it is a call to ethical living. The theological credentials of the teaching will demand ethical applications. Theology and ethics are not in opposition but complementary, but it is theology that is the teachings foundation and this foundation places it in the heart of the Church.

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2 For a more comprehensive description of why it is important to ensure that the teaching is understood within a theological framework see chapter five, pages 225-227.
I do not believe that Pope John Paul II set out to destroy the theological credentials of the teaching but he displayed a tendency to favour the philosophy of personalism to frame his approach to CST. In this particular framework I believe that the teaching loses some of its prophetic power. Earlier in the thesis (chapter 3, p.110), I cited Samuel Gregg who defined the philosophy of personalism in the following terms: “Because man is a person and the conscious subject of moral acts – a being who makes free choices about himself – he is ultimately responsible for his sinful attitudes and acts, *not* structures.” In that same chapter I cited Mary Elsbernd who stated that:

> Documentation has demonstrated, however, that the encyclical writings of John Paul II intentionally stray from earlier emerging articulations of a historically conscious methodology in preference for a transcendental or Thomistic personalism as the basis for universal and absolute norms transcending all historical contingency.

The Church documents that aided and abetted the formulation and development of the teaching on the preferential option for the poor were biblically based and existential. Pope John Paul II set another criterion for his documents. I repeat that neither an adherence to the natural law or to personalism acts as a deterrent to practicing an option for the poor, but it does frame the teaching in ethical rather than theological language. It is this particular criterion that impoverishes the teaching by withdrawing it from its divine revelatory foundation.

Pope Francis has categorically re-emphasised the theological credentials of the teaching and this I believe, is one of the reasons that we have seen the teaching receive a renewed thrust.

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The Hebrew Testament consistently speaks of those who suffer unjustly at the hands of the powerful. This theme of condemning the powerful continues throughout the Testament. The liberation from slavery in Egypt comes after the Lord has heard the cry of the people. Widows, orphans and the poor are spoken of as victims of injustice. Through the prophets God displays a consistent preference to those who suffer unjustly at the hands of the powerful. The Incarnation not only continues this theme but expands it by declaring the poor as the first addressee’s of the good news of Jesus Christ.

If I could speak on a more personal level I would say that my belief in the teaching on the preferential option for the poor is based upon my faith in Jesus Christ. God’s revelation via the Incarnation calls me to a discipleship that prioritises those, who through poverty are subject to premature death. Ethical theories and doctrinal statements may assist in the application of this teaching but my commitment is to Jesus Christ, not doctrine. Furthermore, my commitment to the risen Lord is expressed within a community of those who share this commitment; that is within the Church. The Church, to respond more effectively to God’s revelation needs to ensure that the teaching is at the heart of her identity and mission. The teaching should be recognised as an essential component for the formation of disciples.

Liberation theologians adjudged poverty as an offence to God’s divine love and posed a simple question. How can the Church tell those who suffer poverty (premature death) that God loves them? Religious fatalism was not the answer, nor was individual acts of charity. The Church needed to offer a more universal answer and the teaching on the preferential option for the poor provides that answer. Through the teaching the Church says that God, and therefore the Church loves them and wishes to prioritise their needs. This priority will
require ethical action but it is founded in God’s love rather than any particular ethical framework. The theological credentials of the teaching will demand ethical applications. Theology and ethics are not in opposition but complementary, but it is theology that is the teachings foundation and this foundation places it in the heart of the Church.

The teaching on the preferential option for the poor is a constitutive dimension of the gospel mission. The rich history of the Catholic Church’s teaching on the virtue of justice, which includes the categories of general, commutative, and distributive justice can still play a role in how the wider Church can concretise the teaching. But what the Church’s biblical renewal highlighted was that the option for the poor is based upon the life of Jesus rather than the virtue of justice and it is for this reason that the teaching needs to be understood as theocentric. The biblical nature of the teaching was the foundation for its formulation. The Natural Law Theory which has been prominent in providing the Church with its ethical framework and the philosophy of personalism are not the source of its origins.

The Church must maintain a “gospel focussed” approach to the scourge of poverty. The poor have biblical priority and they should have theological priority and in a Church of the poor that is what they will have. Historical projects which reflect this theological priority will still be necessary and ethical frameworks will assist in the concretisation of these projects. The teaching on the preferential option for the poor is based upon revelation and our adherence to this teaching is first and foremost an act of authentic discipleship.

I have documented that the Magisterium’s initial and partly justified opposition to liberation theology was that theology’s association with Marxism and its use of Marxist tools for social analysis. As the controversies regarding its Marxist tendencies diminished, the decisive area of discussion shifted to ecclesiology. At the Second Vatican Council, the ecclesiology that
was presented was the definition of the Church as the “People of God.” This was to be a Church constantly developing in her self-understanding of her God-given mission in the world. Her structures and practices needed to keep evolving and adapting in the myriad of cultures that she was sent to evangelise, while at the same time keeping faithful to her received tradition. The Council also called for the Scriptures to be the soul of all theologies and this led to a fruitful post Vatican Council era for biblical scholarship. These key factors – ecclesiology and scriptural scholarship – provided great stimulus for critical thinking. The teaching on the preferential option for the poor emanated from this thinking. These factors not only influenced the emerging liberation theology, but also the Church’s Magisterium.

Another contributing factor to the stagnation of the teaching on the preferential option for the poor was that Pope John Paul II approached and defined the issue of poverty very differently to those who formulated and developed the teaching. In his critique of Pope John Paul IIs 1997 document *Ecclesia in America*, Rafael Luciani states:

> The document defines the poor as the addressees and recipients of a preferential “social and charitable work,” not as subjects of a process of evangelisation and liberation in history. In dealing with the poor it goes no further than making a pastoral appeal in two directions: to alleviate the most serious and urgent needs of the poor, and to denounce the roots of the evil that spring from social, political, and economic structures.

What this meant was that greater emphasis was now being placed on individual conversion along the lines of the “Christendom” model. No connection was made between the forms of ecclesial structure and the crisis in the transmission of the faith, nor was evangelization seen as having anything to do with the processes of socio-political transformation of peoples.⁵

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⁵ Rafael Luciani, *Pope Francis and the Theology of the People*, 79-80.
While I acknowledge that this is but one critique, I believe it offers another reason as to why the teaching, a teaching that was communal and sought transformation at both the socio-political and ecclesial levels, stagnated during the papacies of John Paul II and Benedict XVI.

Liberation theology and our contemporary theological understanding of the Church first and foremost as the people of God, have presented an ecclesiology that is better placed to allow the teaching to flourish. But theirs are not the only or last word on ecclesiology. Future developments in ecclesiology and scripture scholarship may offer even more opportunities for Church renewal that may improve the position of the teaching of the preferential option for the poor. What I have argued is that an ecclesial model that is authoritative, centralised, and clerical, has, thus far at least, proven to be ineffectual in relation to the Church’s understanding and application of the teaching.

During the historical period from 1988-2015 the Church of its own volition recognised that it failed to implement effective formation programs in regard to its broader CST agenda. The Pontifical Council for Justice and Peace, states: “The doctrinal patrimony is neither taught nor sufficiently known, which is part of the reason for its failure to be suitably reflected in concrete behaviour.”\(^6\) This dereliction has been another contributor to the stagnation of the teaching on the preferential option for the poor. While it is my firm belief that the teaching would more likely flourish within the ecclesiology promoted at the Second Vatican Council and the reformation that Pope Francis is now extolling, I also believe that the teaching should have been more effective in an authoritarian and centralised ecclesial model.

As an officially recognised principle of Catholic teaching it was incumbent upon the Church’s official formation programs to teach future ordained leaders how to live and communicate

the teaching on the preferential option for the poor to their respective communities. There is some historical evidence to suggest that the Church made efforts in this direction. In 1988 the Congregation for Catholic Education published a document in which it explicitly called on seminaries to educate the future clergy in the principles of CST. The document was titled: *Guidelines for the Study and Teaching of the Church’s Social Doctrine in the Formation of Priests.* The document is explicit in its call for the Church’s social doctrine to be a part of seminary education:

> With regard to the space to be reserved for social doctrine within the program of studies in Centres for Ecclesiastical formation, it seems clear that, in conformity with what has been said, it is not enough to deal with it in some optional lessons within philosophy or theology courses. Required and elective courses on this discipline must be included in the program.

In recognition of the theological method of Gustavo Gutiérrez which judged the writing of theology as secondary to “lived experience” the documents states:

> For professors to teach social doctrine not as an abstract theory, but as a discipline directed toward concrete action, direct pastoral experience will be most useful to them. It will be an experience that is diversified according to places, situations and the abilities and inclinations of each one, but

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8 Ibid., # 1.
9 Ibid., # 73.
always chosen and set up to enhance the concreteness, validity and effectiveness of their teaching.\textsuperscript{10}

It is disappointing that the document contains no specific section on the preferential option for the poor, but the fact that a chapter is dedicated to the formation of the clergy in matters pertaining to social teaching is encouraging. It is important to remember that this formation is for the benefit of the communities these clerics will serve. This is a model that remains hierarchal with the teaching of the Magisterium being the animating force, but it also signifies an attempt by the hierarchy to imbue the structures of local Church communities with an understanding of CST.

In a 2010 publication titled *Rich and Poor*, the authors (Clark and Alford) wrote: “Unfortunately, the Catholic Social Thought tradition has gained the nickname “the Church’s best-kept secret.” Until recently most Catholics knew very little about it (in fact, many seminaries still do not include it as part of priestly formation).”\textsuperscript{11} In a hierarchal Church where the clergy are poorly formed in the principles of CST, and this includes the teaching on the preferential option for the poor, the inevitable consequence is stagnation. In this scenario, the laity is literally denied the opportunity for knowledge as they are neither taught nor encouraged to engage with an important component of their Catholic heritage.

In the Church’s hierarchal structures, the role of the Bishop is paramount.\textsuperscript{12} If the Bishop is not committed to the teaching on the preferential option for the poor it will struggle to take

\begin{small}
\textsuperscript{10}Ibid., # 70.
\textsuperscript{12}Instructions on Certain Aspects of the Theology of Liberation states: All priests, religious and lay people who hear this call for justice and who want to work for evangelization and the advancement of mankind will do so in communion with their bishops and with the church.” # 52.

In *Deus Caritas Est*, Pope Benedict XVI says: “The Pontifical Council leads the way for responsibility for the church’s charitable activity. In conformity with the episcopal structures of the church, the Bishops, as successors of the Apostles, are charged with the primary responsibility for carrying out in the particular Churches the program set forth in the Acts of the Apostles (2: 42-44).” # 32.
\end{small}
hold in the communities of that diocese. While I do not have empirical evidence to support my synopsis, human logic dictates that a bishop committed to the teaching will promulgate it more than one who is not. This same committed bishop will encourage the priests and lay leaders of the diocese to do the same.

The *Compendium of the Social Doctrine of the Church* says that “the formative values of the Church’s social doctrine should receive more attention in catechesis”\(^\text{13}\) and that priestly formation should include the social doctrine of the Church.\(^\text{14}\) The Church has been remiss in implementing its own clerical social justice guidelines and this has led to a lack of formation in the wider Church. The Church’s self-accusation leaves it in a bind. Church authorities either “let go” and allow the Church’s social teaching, including the preferential option for the poor to evolve from the grass roots,\(^\text{15}\) or alternatively, they strive to ensure that the priests and pastors who have leadership roles are “formed” in such a way that they live, practise, and promote the teaching (the ideal scenario would include both). This is a huge challenge for the Church and one that I believe it has failed to effectively negotiate. This failure has not only been to the detriment of the teaching on the preferential option for the poor, but also to the other major principles of CST.

As a final but crucial note on the importance of clerical formation for the understanding and application of the preferential option for the poor, none of the abovementioned requires a

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\(^{14}\) Ibid., #533.

\(^{15}\) Pope Francis echoes Pope Paul VI in the 1971 Apostolic Letter *Octogesima Advenieins* saying: “Neither the Pope nor the Church has a monopoly on the interpretation of social realities or the proposal of solutions to contemporary problems. It is up to the Christian communities to analyse with objectivity the situation which is proper to their own country.” (*Evangelii Gaudium*, #184.)
person to be a liberation theologian. What is required is a commitment to the poor from the Church’s clerical formation program and importantly the program’s candidates.

While I would regard the aforementioned focus on clerical formation as an area in which the teaching’s dissemination could improve, I would still argue that this is the “minimum position.” The preferential option for the poor is a theological teaching and requires a theological framework if it is to truly flourish. Liberation theology had provided this framework. Now it is Pope Francis, with his promulgation of a Church of the poor, inspired by a theology of the people, which is providing a framework in which the teaching can rediscover its potency.

A theologian who did not come from the liberationist school but who has been regularly mentioned throughout this thesis is Yves Congar. In an incisive critique of a rich and powerful Church Congar declared: “When the Church becomes rich and/or powerful from where do the prophetic voices come; is it not from the poor?” Congar extrapolates the idea of the poor as reformers by emphasising their existential understanding of a theology of the Cross. He argued that the poor experienced a daily suffering that led them to a deep understanding of the theology of the Cross. An elitist Church which rested comfortably in the presence of the world’s political and economic elites, and was distant from the poor bore witness to a theology of glory. The preferential option for the poor has its roots in a theology of the cross, not a theology of glory. An ecclesiology that focussed on glory was in danger of triumphalism, and triumphalism had nothing to do with the ecclesiology and mission of Gustavo Gutiérrez, Saint Oscar Romero, Dorothy Day and now Pope Francis.

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16 Congar, True and False Reform in the Church, 189.
Inspired by the Church reform at the Second Vatican Council, Gustavo Gutiérrez challenged the Church in Latin America to be good news for the poor by proposing an ecclesiology that would be better suited to their historical reality.\(^\text{17}\) A crucial component of his theology was its communal rather than individual emphasis. “Theology is always an activity carried on in the ecclesial community; it is not a purely individual activity.”\(^\text{18}\) The communal aspect of Christian praxis and its relation to salvation history were central to Gutiérrez’s theology. Theologian Joyce Murray describes Gutierrez’s theological approach.

It was in the context of their communal struggle for liberation that, in the “second act” of theological reflection he developed an understanding of salvation as communion with one another and with God begins in history. In this context, also, he articulated his central soteriological principles which are fundamentally communal in nature. He reasoned that a communal praxis of liberation is necessary in the face of structural injustice and the collective of oppression.\(^\text{19}\)

While it is true that all individual people must confront their attraction to sin, it is also true that structural injustice or structural sin demand a communal response. It was the community, inspired by the gospels and engaged in historical projects (praxis) that would assist in the liberation of people from their anti-evangelical situation. This liberation would be a sign of God’s Kingdom.

Liberation theology introduced the perspective of the poor to the theological narrative and in doing so offered a new outlook on ecclesial structures. This renewal was born of a previously absent periphery, it was an awakening as much as a reformation. While there are undoubted ramifications for the Church if it truly embraces this awakening, there will also be ramifications if it is ignored. A Church that fails to listen to the majority poor will struggle

\(^\text{17}\) See pages 47-49.

\(^\text{18}\) Gustavo Gutiérrez, *The Truth Shall Make You Free*, 174

to provide a suitable environment in which the teaching on the preferential option for the poor can be understood and applied. Earlier in the chapter I mentioned that during the papacies of John Paul II and Benedict XVI the Magisterium failed to incorporate the more fruitful aspects of liberation theology into its promotion of the preferential option for the poor. The aforementioned aspects of Gutiérrez’s theology are examples of that fruitfulness. In regard to reform Yves Congar states: “I wonder sometimes in the history of the church people who believed they were defending tradition, but who were in fact defending custom, didn’t take advantage of the prestige and power they had to create roadblocks for authentic appeals for renewal.”

Congar spoke about reform in the Church coming from the peripheries and this is what Gustavo Gutiérrez, St Oscar Romero, Dorothy Day and now Pope Francis clearly understand: “The greatest changes in history were realized when reality is seen not from the centre but from the periphery. It is a hermeneutical question: reality is understood only if it is looked at from the periphery, and not when our viewpoint is equidistant from everything.”

It is no coincidence that the stagnation of the teaching on preferential option for the poor occurred during the restorative ecclesiology practised during the papacies of John Paul II and Benedict XVI. This ecclesiology bore witness to a theology of glory rather than a theology of the cross and their personalist approach led the Church to promote the teaching in a personalist ethical and individual framework rather than the more effective theological and communal one. Even the potential for the teaching to grow in this historical era was quashed by the Church’s incapacity to implement its own formation program.

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20 Yves Congar, *True and False Reform in the Church*, 157.
21 Rafael Luciani, *Pope Francis and the Theology of the People*, 56.
Pope Francis has extrapolated the idea first proclaimed by Pope John XXIII of a Church of the poor and his ecclesial reform understands the capacity of the poor to evangelise the Church. The poor are vulnerable and yet their faith is strong; they trust in God and it is this trust that animates their faith. This “pedagogical vulnerability” had been understood by Dorothy Day and the Catholic Worker Movement (CWM) well before Pope Francis’ renewal. Gutiérrez was adamant that a Church of the poor needed to be in solidarity with the poor at the ecclesial as well as individual level. He did provide a framework for this “poor church,” a church that would be present to and representative of the poor. Gutiérrez certainly wanted the Church to listen to the poor and believed in their evangelising power, but like so many of the early liberation theologians was initially at least, hesitant to embrace the poor’s traditional piety, regarding these practices as an evasion of their historical reality. Pope Francis thinks differently and regards respect for the poor’s piety as representing an option for the poor.

The theology of the people differs from liberation theology as it places greater emphasis on the relationship between faith and culture and appreciates how the poor draw inspiration from these practices. This difference has not however placated his detractors.

The voice of the poor is not a threat to the Church per se, but they are voices that challenge the Church to shift from a position of power and privilege. One of the consistent themes I have presented throughout this thesis is the hierarchal Church’s incapacity for self-interrogation. This incapacity had led the Church in Latin America (and perhaps elsewhere) to be distant from the poor. The Medellín Documents and Gutiérrez’s *A Theology of*

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22 See pages 47-49.
23 “Two voices, and also two silences, are needed if people are to listen to each other. ‘To incarnate the Word of God in the diversity of human experience’ means being attentive to the cultures they express and appreciating their values. It also implies ‘not being bound to any [culture] in particular.’ This last is hard to put into practice in a Church deeply rooted in Western culture.” (Gustavo Gutiérrez, *Essential Writings*, 152).
Liberation sought greater solidarity with the poor by breaking the Latin American Church’s comfortable relationship with the continents political and economic elites. If we allow the Church to be evangelised by the poor (that is the majority of the world’s Catholics) we are, in the words of Clemens Sedmak, changing the Church’s epistemic position. Pope Francis’ proposal of a Church of the poor is an ecclesial, not doctrinal reformation and it would be my suggestion that his proposed ecclesiology provides the structures in which the teaching on the preferential option for the poor could potentially be better understood and applied.

Before concluding this emphasis on the importance of internal ecclesial renewal for the future understanding and application of the preferential option for the poor, I would like to re-emphasise three key components that have been constantly referred to throughout this thesis. The first of these is the Second Vatican Council definition of the Church as “The People of God.” This definition was integral in the evolution of the perspective of the poor becoming an authentic contributor to the Church. The second is the Vatican practise of collegiality. The third is the importance of understanding and framing poverty within Gutiérrez’s threefold definition. The first two are important factors in the ecclesial reform proposed by Pope Francis. The third is I believe a suitable framework by which Church communities can measure their commitment to the teaching on the preferential option for the poor.

The People of God: The definition of the Church as the “People of God” came from the highest authority in the Church. This definition placed the responsibility of the Church’s mission into the hands of all the baptised. From the Latin American perspective a majority of the people of God were poor and it was their experience, the lived reality of their faith that enabled the Church to be a more faithful representation of the human reality of the Church.
Latin American theologians and all the prophetic bishops were convinced that poverty and the option for the poor are not purely ethical issues; they belong to the essence of the church because they are qualities of the people of God, i.e., the human reality of the church. When the notion of the “people of God” is removed, the option for the poor ceases to be an important issue, and the poverty proclaimed by the church is reduced to a pious spiritual exhortation addressed to each individual Catholic, without committing the institution as a whole.25

A Church that allows all the faithful to have a voice will recognise the importance of listening. The Bishops must first listen to the people of their diocese and then communicate their voices to the Church in Rome. Medellín drew upon the faithful, particularly the poor, and began the process of teaching the local and global Church hierarchy of the importance of listening to the poor. Pope Francis implores the whole Church to practise the art of listening. “Only through such respectful and compassionate listening can we enter on the paths of true growth and awaken a yearning on the Christian ideal: the desire to respond fully to God’s love and to bring to fruition what he has sown in our lives.”26 Listening to the people of God allows the frontier of the Church to impact the core of the Church. This impact has the potential to encourage ecclesial renewal.

**Collegiality:** Pope Francis’ revival of the teaching on the preferential option for the poor is intricately linked with his ecclesiology and an important aspect of this ecclesiology is collegiality. The issue of collegiality was discussed in chapter five27 but its importance in allowing localised Churches to investigate pastorally relative responses to provincial problems cannot be underestimated. Listening is a key component of collegiality. In keeping with the definition of the Church as the people of God and in the spirit of *Octogesima*

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26 Pope Francis, *Evangelii Gaudium*, # 171.
27 In relation to collegiality Pope Francis states: “Yet this desire has not been fully realised, since a juridical status of episcopal conferences which would see them as subjects of specific attributions, including genuine doctrinal authority, has not yet been sufficiently elaborated. Excessive centralisation, rather than proving helpful, complicates the Church’s life and her missionary outlook.” (*Evangelii Gaudium* # 32).
Pope Francis has listened to, respected and encouraged local Churches to formulate particular pastoral responses and this, I believe, will assist in the understanding and application of the teaching.

**Gutiérrez’s threefold definition of poverty:** Gutiérrez’s definition offers Catholic communities throughout the world a framework by which they can effectively measure their holistic response to the teaching on the preferential option for the poor. I initially mentioned this definition of poverty in the first chapter and then re-emphasised it in chapter four, when promoting Dorothy Day as an example of someone who was not a liberation theologian but was an authentic practitioner of the preferential option for the poor.

A foundational premise of this thesis was that poverty was a moral issue and Gutiérrez’s first component of his definition of poverty concurs. Poverty is a scandalous condition not only because it creates untold suffering but because from the Christian perspective it is anti-evangelical or anti-kingdom. The basis of this premise is biblical not ethical. Christians may debate how best to respond to this scandal, but the Church must emphasise that the teaching is a biblically based response to a situation that is contrary to the good news of Jesus Christ. Dorothy Day also understood poverty as a scandalous situation but had determined this before she became a Catholic. In fact, she adjudged Christianity as complicit in this situation and her association with socialism was due to her belief that it was that ideology which sought to defeat the scandal, not Christianity. Her entry into Catholicism increased her belief that poverty was scandalous and in the Catholic Worker Newspaper there would be a continued emphasis on this very point.

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28 See pages 46-47.
29 See pages 190-193.
The Catholic Church has a rich heritage in the area of spiritual poverty and Gutiérrez’s second component of his definition on poverty expands rather than supersedes this heritage. The importance of spiritual detachment remains as is evidenced in Gutiérrez’s proposal for a new ecclesial model which demands a simpler lifestyle for the clergy and a Church that is more closely connected to the poor.\textsuperscript{30} Spiritual poverty should lead to material detachment but that detachment allows for openness to God and it is God’s preferential love for the poor that leads one to a realisation of this scandalous and anti-kingdom situation. Spiritual poverty denounces materialism and consumerism but it also announces a deeper awareness of God’s love for the poor and our need to represent that love.

Dorothy Day regularly engaged with the traditional spiritual practises of the Church such as Mass, prayer and confession but this spirituality led to a deepening commitment to the poor, not a detachment from them. In keeping with Gutiérrez’s second component of poverty, Dorothy was detached from materialism and consumerism in order to be attached to the poor.

The third and final component of Gutiérrez’s definition of poverty is solidarity and protest. His definition moves from premise (scandalous situation) to prayer (spiritual poverty) to praxis (solidarity and protest). Historical projects that reflect this solidarity and protest are necessary if the preferential option for the poor is to be at the heart of the Church’s identity and mission. These historical projects will be relative to the environment in which people find themselves. Whether people live in the first world or the developing world, a

\textsuperscript{30} See pages 47-49.
democratic or socialist country, the principle remains the same. The projects will differ but not the process.

Dorothy Day and members of the CWM lived in community with the poor, published a newspaper that highlighted their suffering and went to prison on their behalf. Gutiérrez’s third component of poverty being solidarity and protest were a daily mantra for Dorothy Day and the CWM.

The framework for Gutiérrez’s definition of poverty is neither provincial nor outdated. It offers a criterion which allows the Church, through its dioceses, parishes, congregations and organisations to concretise the preferential option for the poor in any historical or geographical condition. It allows poverty to remain a moral issue, deepens our faith and commitment to God and neighbour, and promotes a theology of praxis. One does not need to be a liberation theologian to utilise this definition of poverty.

### Areas for Future Development

Two internal areas that I believe remain underdeveloped in the teaching on the preferential option for the poor are the relationship between the teaching and violence, and between the teaching and the liturgy. These are areas that are worthy of reflection if the teaching is going to claim a more prominent place in the universal church.

One of the criticisms of liberation theology in the document *Instruction on Certain Aspects of the Theology of Liberation* was its potential for violence and I believe this to be a valid critique. While the Vatican’s concern was related to the violence contained within

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31 See pages 76-78.
liberation theology’s use of Marxist ideology, neither liberation theology nor CST offer any serious reflection on the relationship between non-violence and the preferential option for the poor. It was Dorothy Day and the CWM that offered some insight into this relationship. Dorothy and the CWM were committed to pacifism and regarded it as integral to their mission; their prophetic stance raises some interesting questions for the teaching. Dorothy makes specific mention of the vulnerability that the CWM experienced due to its pacifist stance and how she understood that feeling as a form of solidarity with the poor. Her quote in relation to that experience is worth repeating: “When we are being called appeasers, defeatists, we are being deprived of our dearest goods, our reputations, honour, the esteem of men, and we are truly on the way to becoming the despised of the earth. We are beginning perhaps to be truly poor.”

The other important aspect of the pacifist position was and is that it stands in direct contrast to both Marxist and neoliberal ideology. The teaching on the preferential option for the poor could benefit from further reflections on pacifism and its relationship to poverty.

The other area within the Christian/Catholic tradition that could assist in the formation of the faithful in the teaching on the preferential option for the poor would be to investigate the role that the liturgy plays in the formation of a community. The more specific question would be whether the teaching could be inserted into the liturgy of the Church as a way to deepen the faithful’s understanding of it? Yves Congar had stated that the Eucharistic celebration was an “exceptionally existential norm” so its capacity for formation should be

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33 Yves Congar, True and False Reform, 291.
appreciated. Dorothy Day certainly understood this and was adamant that there was an intimate connection between the Eucharist and CST.  

*Instruction on Certain Aspects of the Theology of Liberation* expressed concern over liberation theology’s efforts to highlight the injustice perpetrated upon the poor within the liturgy and Gutiérrez responded with what I regarded as an accurate rebuttal. The argument focussed on the unity that the Eucharist represents with Gutiérrez suggesting that the unity proclaimed in the Eucharist highlights the division in the world. One could suggest that on this occasion both had valid points.

The Church should acknowledge that the Eucharist stands in stark contrast to a world of greed, individualism and consumerism. During Eucharist we discover a solidarity that shares not only the body and blood of Christ, but challenges us to share our resources and indeed our very being.

It is openly secularized modern society that has unreservedly elevated individualism – ‘anti-gift’ – to a common principle, shared by all and therefore ‘sacred’, uniting everyone ‘religiously’ in a consensus around the sacrality of the individual and moulding society on a powerful yet socially destructive basic principle – individualism, which ‘does not share’. Because it does not share its being, it does not share its possessions or its power.

The liturgy is not the starting point for political activity, but it is a vital component in the formation of disciples of Jesus Christ and it is for this reason that the relationship between the liturgy and the teaching should be investigated. Clearly the Eucharistic liturgy is not the only avenue of formation but it is the most sacred and consistent celebration of catechetical

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34 “We cannot love God unless we love each other, and to love we must know each other. We know Him in the breaking of bread, and we know each other in the breaking of bread, and we are not alone anymore. Heaven is a banquet and life is a banquet, too, even with a crust, where there is companionship.” (Cited in Brigid O’Shea Merriman, *Searching for Christ: The Spirituality of Dorothy Day*, 98.

35 See “Misrepresentation of Sacramentality” on pages 74-76.

formation Catholics have. It is important that we believe in the formative and transformative power of the Eucharistic; to experience it as a communal celebration that can bring about real change in our lives and the life of the world. In a blunt assessment of the need to connect the Eucharist with the call to discipleship William Cavanaugh writes: “Those of us who partake in the Eucharist while ignoring the hungry may be eating and drinking our own damnation.”

Pope Francis states: “The Church evangelises and is herself evangelised through the beauty of the liturgy, which is both a celebration of the task of evangelisation and the source of her renewed self-giving.” While the Pope clearly understands the formative power contained within the liturgy, I would suggest that his ecclesial renewal could also benefit from a liturgical renewal that appreciates the relationship between the liturgy and the preferential option for the poor.

Re-establishing the prominence of the Church as the people of God, practising collegiality and Gutiérrez’s threefold definition of poverty, investigating the relationship between pacifism, the liturgy, and the preferential option for the poor could all offer further methods of reviving the teaching? None of these suggestions require a person to be a liberation theologian.

The External Challenges of Promoting the Preferential Option for the Poor

While this chapter has thus far focussed on the internal methods that could potentially assist the Church to better understand and apply the teaching of the preferential option for

37 William T. Cavanaugh, “Consumption, the Market, and the Eucharist,” Hunger, Bread and Eucharist 94.
38 Pope Francis, Evangelii Gaudium, # 24.
the poor, I would also like to comment on how the Church might improve its capacity to relate the teaching to the wider society. In the Introduction I spoke of the optimism contained within CST in which the Church expressed that its broad social agenda was capable of engaging with all people of good will. While I would like to maintain this optimism, I would suggest that promoting a preferential option for the poor in the world today will be a difficult task. This thesis has presented four people (Dorothy Day, Saint Oscar Romero, Gustavo Gutiérrez and Pope Francis), who are representative of different historical times, different geographical places, and diverse theological positions, yet were attacked from inside and outside the Church for their commitment to the poor. The common denominator for these people was not their adherence to liberation theology; it was and remains their fidelity to the Gospel which has led them to solidarity with the poor.

The Church’s starting point for dialogue with those outside its boundaries regarding the preferential option for the poor must be its own commitment. A simpler, poorer Church; a church separated from privilege, wealth, power and clericalism can begin this dialogue from a position of authenticity. In Chapter One I made brief mention of a document titled The Pact of the Catacombs and it would seem that this document might have some sound advice for a Church seeking to be more authentic in the promotion of its own teaching on the preferential option for the poor. Monsignor Hector Scerri writes of a speech that Pope Francis gave in December 2014 when he spoke of “curial diseases.” “Among these, one is invited to pause on just three of them which help us recall the main thrust that the Pact of the Catacombs sought to counter: (a) mental and spiritual petrification; (b) rivalry and vainglory; and (c) worldly profit and self-exhibition.”39 While I recognise that the re-emergence of this document can be of benefit in understanding and concretising Pope

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Francis’ desire for a poorer Church, The Medellín documents and Gutiérrez continue to provide solid directions for how this Church can be an authentic witness to its teaching. Ultimately, this is a Church willing to be transformed at every level of its structure and only from this authentic position would it be able to effectively dialogue with the world.

I have already spoken of the need of the Church’s clerical formation programs to recommit to its goal of effectively educating priests in CST but the whole area of clericalism is a stumbling block in relation to the promotion of the preferential option for the poor. Simply stated, unless Church leaders live a more simple lifestyle that is in keeping with the Church’s preferential option for the poor then dialogue with those outside the Church is compromised. The Church, through its clerics must live more simply.40

Pope Francis has expressed great concern regarding clericalism, which he sees as a distortion of ecclesial power.41 Rafael Luciani summarises the Pope’s attitude:

Francis criticizes those who view the calling to the priesthood or to religious life under a distorted theology of vocation, according to which God separates a person from the world in order to set him or her on a level higher than that of other members of the Church. The result has been a paralysed ecclesial structure that has been unable to discern or respond to the current signs of the times and seems, with its top-down view, to sidestep the dramatic situations affecting poor peoples, the great majority of humankind.42

The Church’s teaching on the preferential option for the poor offers itself guidelines that direct it to protest any law/s (including its own) which do not prioritise the poor. While the

40 Walter Kasper in his book *Mercy* writes: “In following Jesus, the church can be a church for the poor, only if it, and particularly, the clergy, seek – if not to live like the poor – at least adopt a simple and unassuming lifestyle. The age of feudalism should nowadays also be over for the church.” 173.

41 Pope Francis writes in *Evangelii Gaudium* # 107: “Seminaries cannot accept candidates on the basis of any motivation whatsoever, especially if those motivations have to do with affective insecurity or the pursuit of power, human glory or economic well-being.” (Strathfield: St Pauls Publications, 2013).

42 See *Evangelii Gaudium* #102, 104 and 107.

42 Rafael Luciani, *Pope Francis and the Theology of the People*, 145.
Church’s historical opposition to Marxist-Socialist ideology is clear, so too is its concerns regarding unbridled capitalism and it is liberal capitalist ideology that has risen to prominence in the world today. Even if liberal-capitalist proponents claim that their ideology is a more effective system to assist the poor, it does not necessarily follow that they are making a preferential option for the poor. In the 1931 social encyclical *Quadragesimo Anno* Pope Pius XI spoke of the “economic individualism that led to economic imperialism” evident in liberal-capitalism.\(^{43}\) Jacques Maritain warned of the potential for individualism and inequality contained within modern liberal democratic ideology\(^{44}\) and Pope John Paul II echoed these concerns in the 1991 encyclical *Centesimus Annus*.\(^{45}\) In his book *After Virtue*, philosopher Alasdair MacIntyre wrote: “Modern society is indeed often, at least in surface appearance, nothing but a collection of strangers, each pursuing his or her own interests under minimal constraints.”\(^{46}\) Gustavo Gutiérrez writes: “We live in an era whose spirit is not very militant or committed. Within a neo-liberal and postmodern framework, rooted in an aggressive individualism, solidarity seems ineffective and a remnant of the past.”\(^{47}\)

I reference all these authors, of which only one is a liberation theologian, to highlight the difficulty that the Church faces in promoting the preferential option for the poor in today’s wider society. If the Church allows for the teaching to be coerced into an individual choice, in a world that promotes individualism and has disassociated poverty from the moral realm then the teaching will struggle to have any significant impact.

\(^{43}\) Pope Pius XI, *Quadragesimo Anno*, # 108.

\(^{44}\) Jacques Maritain: “The moral crisis of our occidental civilization and the disastrous spasms of our liberal, capitalist economy, exhibit all too clearly the tragedy of bourgeois individualism.” (*The Person and the Common Good*, 95).

\(^{45}\) Pope John Paul II, *Centesimus Annus* # 42.


The Catholic Church is not opposed to capitalism and neither for that matter is the teaching on the preferential option for the poor. The Pontifical Council for Justice and Peace states:

A truly competitive market is an effective instrument for attaining important objectives of justice: moderating the excessive profits of individual businesses, responding to consumers’ demands, bringing about a more efficient use of conservation of resources, rewarding entrepreneurship and innovation, making important information available so that it is really possible to compare and purchase products in an atmosphere of healthy competition.48

Pope Francis’ has denounced economic structures that do not put the poor first; he has not denounced capitalism per se. The Church, to be faithful to the Gospel must oppose any ideology that induces rampant individualism, consumerism and greed. “We as Christians have no choice but to revolt, to subvert any order that tolerates this situation, let alone encourage it and increase it. What the prophets warning cries out is the poor must come first. Those who suffer must be listened to first and attended to first.”49

While protest will be part of the Church’s policy in promoting the preferential option for the poor, this does not dismiss the need for dialogue. This dialogue is not about compromising Church teaching but the Church needs to investigate methods that promote the teaching in any given circumstances. The very fact that the preferential option for the poor becomes a topic of conversation in churches, communities and governments throughout the world would be a step forward.50

49 Megan McKenna, *Send My Roots Rain*, 300.
50 Ivan Petrella in *The Future of Liberation theology* states: “If imitation is the sincerest form of flattery, then the co-option of liberation theology terminology is a tribute to its impact within theology and beyond; even the International Monetary Fund and the Vatican espouse the preferential option for the poor.” 121.
To maintain the teaching’s prophetic edge, the Church, from an internal perspective must emphasise and re-emphasise that the teaching is a call to discipleship. Externally, the Church needs to relate the teaching to the common good and integral human development.

**Concluding Comments**

The Church’s teaching on the preferential option for the poor is a legacy of liberation theology and as a concrete reflection of the teaching, liberation theologians insisted on the Church engaging in historical projects:

Latin American liberation theology was born with the promise of being a theology that would not rest with merely talking about liberation but would actually help liberate people from material deprivation. It thus had two parts: a rereading of Christianity from the perspective of the oppressed and the construction of ‘historical projects’; models of political and economic organization that would replace an unjust status quo.  

If Pope Francis’ advocacy of a Church of the poor is to move beyond ideology he needs to encourage historical projects. “The Church can only be God’s Church when its goal is not simply to uphold its existence and influence as an organisation and institution. It has to be a Church for others and as such it must participate in God’s liberating action in history.”

There is absolutely no need for a person to be a liberation theologian to participate in historical projects that represent a preferential option for the poor. What is important is that Catholic communities throughout the world do engage with the poor. The projects will differ according to local situations but it is in the process of engagement that communities will simultaneously be educated and formed.

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When human beings act individually and/or collectively from a place of greed, selfishness or indifference, we are operating from a position contrary to God’s law of love and expressing no desire to be in solidarity with others; it is a position of injustice and is “anti-Kingdom.” Anyone who participates in the creation or maintenance of poverty; who is indifferent or ignorant toward the poor, is methodically alienating a vast number of peoples and is denying any sense of human solidarity. Any theological stream that promotes praxis will remind the Church that she lives in the heart of history and must therefore constantly reflect on its own moral position within that world. New theologies and new ways of being Church should illuminate the Church’s deficiencies and call her to a more authentic practise of the preferential option for the poor.
Conclusion

Theologian Edward A Lynch published an article in 2006 called *The Retreat of Liberation Theology*.¹ In the article Lynch claimed that the theology had become an intellectual curiosity that had failed in its primary mission of renovating Latin American Catholicism. While Lynch’s conclusion regarding the failed renovation of Latin American Catholicism has some validity, I find his overall summary contains inaccuracies. Liberation theologians formulated a theology which enabled them to conclude that an option for the poor would be one of its primary goals and that the renovation of the Latin American Church was a necessary requirement for the Church to practise effectively this option. The fact that this renovation has thus far failed is evidence that the Church in Latin America and other parts of the world has been unwilling and/or incapable of making this transition from its privileged position to becoming a Church of the poor (renovation). It is a situation that a first Pope from Latin American is now trying to rectify.

Lynch correctly argues that orthodox leaders such as Pope John Paul II have claimed for themselves liberation theology ideals such as the preferential option for the poor while simultaneously curbing its theological influence. What Lynch fails to investigate, or even mention, is whether the then Pope John Paul II’s claiming of the teaching led to an increase in its understanding and application throughout the Catholic Church. From the perspective of this thesis the question was not primarily how Popes John Paul II and Benedict XVI responded to liberation theology but how their response to the theology impacted the Church’s understanding and application of the teaching on the preferential option for the poor. The answer, I have concluded, is negative.

Despite the historical criticism directed toward liberation theology and the fair and legitimate questions raised as to whether this theology would actually liberate the poor, the fact remains that liberation theology was the major contributor to the formulation and development of the teaching on the preferential option for the poor. I would further add that the Church which liberation theologians were trying to renovate was incapable of formulating such a teaching. The successes and failures of liberation theology will be debated for some time but it was this theology that articulated a theological method that engaged with, and listened to the “peripheries” of the Church. It was this theology that revealed Christianity from the perspective of the poor and oppressed. Previously absent voices could now be acknowledged as an indispensable theological resource for the Church’s historical narrative. We cannot come to an understanding of the depth and breadth of the teaching on the preferential option for the poor without some understanding of liberation theology and an acknowledgement that the detachment of the teaching from its liberationist origins curtailed the Church’s understanding and application of the teaching.

The *Introduction* to this research project offered a framework which contained four major criteria:

**The first criterion** is that the teaching on the preferential option for the poor is an officially recognised teaching of the Catholic Church. The teachings place is within the lexicon of Catholic Social Teaching, not the annals of liberation theology. The historical controversies

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2 Michael Novak’s *Will It Liberate: Questions About Liberation Theology* (Lanham, Maryland: Madison Books, 1991), is a worthwhile contribution to this very question.

3 In an interview in 2009 Gutiérrez stated: Until I turned 40, I never spoke about liberation theology and I think I was a true Christian. So I will be a true Christian after liberation theology. When they tell me liberation theology is already dead, I say: “well look, I wasn’t invited to the funeral and I have some right to be there.” Then I tell them “Well watch out, because I think one day it will die.” By die, I mean it will not have the same urgency as before. That strikes me as normal; it was a contribution to the Church at a given moment. (Gustavo Gutiérrez, Interview by Angel Dario Carrero OFM, Central University of Baimon, Puerto Rico, May 28th, 2009).
associated with liberation theology should not overshadow the teachings position for what it now is: official church teaching. CST has consistently defended the poor. In the preferential option for the poor the Church now proclaims and promotes a teaching that includes theological and scriptural credentials. It is a teaching that is the responsibility of all Catholic institutions and all Catholics.

The second criterion is the inescapable fact that liberation theology was the major contributor to the formulation and early development of the teaching. For this reason, the more fruitful aspects of that theology should continue to assist the Church in its practise of the preferential option for the poor. Liberation theology was born within the Church and did not hesitate to embrace the historical and inductive methodology posited by Pope John XXIII when determining pastoral responses to existential problems. Liberation theology also found inspiration in the Second Vatican Councils definition of the Church as the “People of God.” Just as liberation theology borrowed aspects of Church teaching to articulate its own unique theological approach, the teaching on the preferential option for the poor could benefit from “borrowing” aspects of liberation theology to ensure its fidelity to, and practise of the teaching.

Liberation theology revealed to the Church her own deficiencies. These deficiencies included drifting away from the poor and therefore from her Gospel calling. With the help of a Vatican II inspired renewal in biblical scholarship, liberation theology was able to promote the teaching as one that is theocentric, inspired by the Gospels and a challenge to all those who attest to be disciples of Jesus Christ. Its theological method required praxis and therefore promoted and engaged in historical projects that were liberative and representative of God’s justice. These projects were to be a pathway to the eschatological
kingdom, the fullness of which is beyond this world. “While the messianic light is not ours to
shine, we can still pursue the limited redemption that historical projects provide.”\textsuperscript{4}

Liberation theology emerged in the poorer nations of the world and sought to remind the
Church and the world that poverty is a human moral crisis that impacts us all. Poverty
equates to premature death. The teaching proclaims a partisan justice. “Justice is
preferential; it privileges the rights of the poor. Specifically, it privileges the right to life,
which is the first and fundamental human right and which is supremely the right of the
impoverished majority of the world.”\textsuperscript{5} The suffering poor should elucidate the moral
ineptitude of the whole world and confront all peoples, nations and the Church with their
failings. Liberation theology has been instrumental in guiding the Church to look at poverty
from a theological rather than an ethical perspective and the teaching on the preferential
option for the poor has been the most fruitful result of that perspective. Gutiérrez argued
that for the Church to fully embrace the teaching it needed to be understood as a
theological norm. “God loves preferentially the poor and oppressed whose situation of
premature and unjust death contradicts the divine will in history. God’s choice tells us more
about who God is than who the poor are. For this reason the preferential option is a
theological norm.”\textsuperscript{6}

The third criterion of the thesis was that the Church needs to continue to investigate ways
in which the Church can understand and apply the teaching. The teaching on the
preferential option for the poor is found in the God in whom we believe, not liberation
theology. The teaching is in keeping with the Gospel law to “love your neighbour.” It is an

\textsuperscript{4} Ivan Petrella, \textit{The Future of Liberation Theology}, 121.
\textsuperscript{5} Daniel M. Bell, Jr. \textit{Liberation Theology After The End Of History} (New York: Routledge, 2001), 121.
\textsuperscript{6} Gutiérrez, \textit{Essential Writings}, 78.
other-oriented practise that challenges individuals and communities to look beyond the circumference of themselves, to bridge the widening chasm of global inequality and think in terms of the common good. These are practices not only of individuals within the Church but for the whole Church:

It is the function of the Church, led by the Holy Spirit who renews and purifies her ceaselessly, to make God the Father and His Incarnate Son present and in a sense visible. This result is achieved chiefly by the witness of a living and mature faith, namely, one trained to see difficulties clearly and to master them. Many martyrs have given luminous witness to this faith and continue to do so. The faith needs to prove its fruitfulness by penetrating the believers’ entire life, including its worldly dimensions, and by activating him toward justice and love, especially regarding the needy.\(^7\)

While I have consistently argued that the formulation and development of the teaching on the preferential option for the poor owes a great debt to liberation theology, I have also argued that one did not need to be a liberation theologian to practise the teaching. Dorothy Day and Pope Francis were presented as evidence of this fact but there are many others that could have been used as examples. What the Church must recognise is that for the purposes of the continued dissemination of the teaching, the Church needs to encourage and allow new theological, scriptural and philosophical insights to elucidate our understanding and application of the teaching. If we can accept that the major reason for practiseing the teaching is in the God whom we believe, and I would further add the God whom we follow, then we will know that our understanding and application of the teaching is far from concluded.

**The fourth criterion** of this thesis and the primary reason that one does not need to be a liberation theologian to practise a preferential option for the poor is that the teaching is

\(^7\) Second Vatican Council, *Gaudium et Spes*, # 21.
fundamentally a call to discipleship. It is true that Jesus Christ loved all and brought salvation for all but the “all” elucidates the reality of the “non-persons” who are victims of history’s fatal attraction to violence and domination. Human history, which includes its political and economic structures have created and maintained this category of namelessness and it is with these victims that Jesus stands. A theology of the cross teaches us this. The Cross is both the pathway to salvation and a memorial for the forgotten and innocent victims of history’s sinful greed. God’s preferential love for the poor should not be regarded as passive. This is a preference that the disciples of Jesus Christ must concretise in order to express their preference.

The Cross of our Lord which upholds all history’s crucified people is good news for all humanity. The Cross itself is a preferential option for the poor. “The crucified people are bearers of salvation insofar as it is precisely in and through them that God confronts oppressors with the good news of salvation. The crucified people, by virtue of God’s election of them to bear the Gospel to the rest of humanity, are a sacrament of salvation.”\(^8\) It is one of the great theological hopes contained in the teaching on the preferential option for the poor that the oppressors may come to see their own immorality and be converted toward a more authentic discipleship. “Christian triumph is always a cross, yet a cross which is at the same time a victorious banner borne with aggressive tenderness against the assaults of evil.”\(^9\)

The magnitude of the poor worldwide should be a constant reminder to us of the necessity of this teaching, but it is important to recognise the Gospel message that the poor themselves carry. The major conversationalists throughout this thesis have emphasised

\(^8\) Daniel M. Bell, Jr. Liberation Theology After The End Of History, 168.
\(^9\) Pope Francis, Evangelii Gaudium, # 85.
what the poor have to offer the Church. For Gustavo Gutiérrez the irruption of the poor into the lives of the non-poor was a God given gift.\(^{10}\) Dorothy Day’s spiritual journey directed her to the poor and it was in their company that she was led to God.\(^{11}\) Pope Francis tells us that when we encounter the poor we meet Christ and encounter the woundedness of the world. It is in these encounters that the Church can be transformed.\(^{12}\)

CST has consistently argued in defence of the poor and is therefore a partisan teaching. It has consistently attacked Marxist-socialist ideology and unbridled capitalism. Its critique of liberal capitalist economics focusses on that ideology’s propensity to value people in terms of production and consumption. In a system were market logic trumps human life there is no preferential option for the poor and the scandal of poverty will continue its death march through history. Practising the preferential option for the poor should assist the Church in overcoming the individualism, greed and inequality that have become characteristic of Modern Western Democracies.

The neoliberal and neoconservative critiques of Pope Francis are falsely accusing him of Marxist tendencies because they are judging him on an inadequate interpretation of his theology and a corrupted understanding of the preferential option for the poor. Even if their economic ideology allows for an increased wealth that will eventually “trickle down” to the poor they are not prioritising the poor. The deeper question for the neoliberal and

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\(^{10}\) Although Medellín and liberation theology spoke of the irruption of the poor into history, Gutiérrez speaks of the irruption of God into our lives via the poor. This irruption takes place in history and exposes the cruelty and oppression which many of our brothers and sisters experience.

\(^{11}\) “It was the Irish of New England, the Italians, the Hungarians, the Lithuanians, the Poles, it was the great mass of the poor, the workers, who were Catholics in this country, and this fact in itself drew me to the Church.” (Dorothy Day, *The Long Loneliness*, 107).

\(^{12}\) “Encounter with others is vital, because faith is an encounter with Jesus, and we must do what Jesus does: encounter others. We need to create a culture of encounter. Another important component of this is that when we step outside ourselves we find poverty.” (Pope Francis, *The Church of Mercy*, 113.)
neoconservative ideologues to investigate is whether they have become complicit in proclaiming and nurturing a system that promotes individualism rather than solidarity and “forms” people in a culture that is contrary to the Gospel and CST.

The historical person and the historical praxis of Jesus is the model for all disciples. Jesus’ starting point is obedience to the Father’s will and out of that obedience He sets about building the Kingdom of God. As disciples we continue to build this kingdom and it is both as a Church and in the Church that we participate in this historical project.

The teaching is liberation theology’s greatest contribution to the Church because it has been accepted and acknowledged by the Church. It does not belong to liberation theology, it belongs to the Church and therefore to all the faithful. The teaching on the preferential option for the poor is a call for a more authentic discipleship and a witness to this discipleship is required at an individual and ecclesial level. If the Church is to truly be a form of Christ’s presence in the world her task includes representing Christ’s image as accurately as is possible. The poverty that is inherent in the Incarnation should be seen in the Church too. The Church should be a Church of the poor.

God’s justice is divine justice and surpasses legal justice (Matthew 5.20). There are no legal measurements of how much we are to share with the poor and hungry. The life of the disciple is not bound by legal measurements; it is directed by what we need to do as disciples. Hunger threatens to destroy life but hunger for God generates life. This generative quality manifests itself in praxis and this praxis both forms and transforms disciples. The power of the parable of the Last Judgement (Matthew 25: 31-46) begins with Christ identifying with the hungry and ends with service to the suffering and needy being equated to eschatological judgement.
It is my belief that the teaching on the preferential option for the poor comes under the category of “divine justice.” This is why the teaching is theocentric, theological and an important practise for disciples of Jesus Christ. The distributive justice evident in the Hebrew Testament and CST will be important components for a Church that seeks historical liberation for all who are oppressed, but the preferential option for the poor emerges from divine justice. We cannot send the poor and hungry away so that they can find something to eat themselves; this is an abdication of our discipleship and a dismal failure of the collaboration to which the disciples of Jesus Christ are called. It is a sin.

At the beginning of this Conclusion I quoted an article titled The Retreat of Liberation Theology. But my concern is that we have witnessed the retreat of the teaching on the preferential option for the poor. If the Church, both individually and collectively displays an ignorance and complacency regarding this teaching are we not in danger of escaping history and practising a privatised and bourgeois Christianity? If the Church focusses on a theology of glory without any commitment to a theology of the cross will we become exclusively worshippers rather than followers (disciples) of Jesus Christ?

The preferential option for the poor is a teaching that protests any political, economic or religious ideology that diminishes the dignity of peoples. It contains an inherent gospel resistance that will ensure that it remains controversial even when separated from its liberationist origins. The teaching does however remain an acknowledged and established teaching within the Catholic tradition, and the Church, in fidelity to its own teaching must constantly seek ways of deepening its understanding and applying the teaching as part of its overall mission.
The teaching on the preferential option for the poor cannot be “wrapped up in nice phraseology and placed in a hermetic container.” It contains the potential to be a dynamic force within the Catholic Church; a teaching that helps define the Church and its mission. It is a teaching in need of disciples no matter what theological or philosophical ideology they may proclaim.
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