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**The Social and Economic Message
of Benedict XVI's *Caritas in Veritate*
in the Perspective of
Roman Catholic Social Doctrine**

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Introduction

In 2009 Benedict XVI published the encyclical letter *Caritas in veritate*. The encyclical *Caritas in veritate* is the main document about social and economic issues that Benedict XVI published during his papacy, and came when a major economic and financial crisis had emerged. *Caritas in veritate* presents itself as a continuation of previous Roman Catholic social doctrine. Given the importance of socio-economic issues in our globalizing world it may be relevant to study the perspective of what has been very recently the leader of one of the largest religious movements worldwide on these issues. Though the encyclical is available in multiple languages, the thought world of the encyclical is not easily accessed. Even among Roman Catholics the knowledge of social doctrine is limited; it was called ‘our best kept secret’ in the sub-title of a recent study.¹ Even if one knows of this encyclical and of Roman Catholic social teaching, the text may easily be misunderstood. For an adequate interpretation, several things have to be kept in mind.

Firstly, it is important to understand the nature and authoritative standing of an encyclical. An encyclical does not presume to be a theological pronouncement with dogmatic authority, but rather is a letter with pastoral and moral advice to people inside and outside the Roman Catholic Church.

Secondly, the encyclical draws on expressions and principles that have been coined in pronouncements of earlier popes. Thus, in order to understand the encyclical *Caritas in veritate* one needs to have a sufficient understanding of key themes and principles as they have been articulated in the history of social doctrine of the Roman Catholic Church. (As synonyms of ‘social doctrine’, we will also use ‘social thought’ and ‘social teaching’.)

Thirdly, the encyclical is not a document that stands alone. Rather, to understand the encyclical one needs to pay attention to other theological writings of Benedict XVI (and his earlier gestalt as cardinal Ratzinger), to other recent and contemporary developments within the Roman Catholic Church such as ‘liberation theology’, and to the contemporary situation in the world at large.

Research questions

The main ambition of this study is to analyse the encyclical *Caritas in veritate* as a new encyclical in the ongoing development of the ‘social doctrine’ of the Roman Catholic Church. In this regard, and referring to the three key issues outlined above with particular attention to the second and the third, the research questions are: to what extent is *Caritas in veritate* continuous with earlier pronouncements? To what extent is it new? In as far as there are new elements, can these be understood in relation to the theological thought of Joseph Ratzinger, who became pope Benedict XVI? To what extent can the specific points of view present in *Caritas in veritate* be seen as responses to contemporary social and economic developments such as globalization, or to new insights in the human sciences and contemporary secular thought?

¹ See E. P. DE BERRI, J. E. HUG, P. J. HENRIOT, M. J. SCHULTHEIS, *Catholic social teaching. Our best kept secret*. Maryknoll, NY: Orbis Books, 2003. 3. This expression was used to refer to Roman Catholics in the United States, but here it is considered relevant also for other contexts.

This analysis and its author

Though the central object of study is a pastoral and normative pronouncement of a religious leader, the method aspires to be analytical. The study tries to unfold the language of the encyclical and give, when it is possible, the eventual connections of ideas present here with previous teaching of the Roman Catholic Church and with developments and ideas from elsewhere. –

For the sake of honesty, it may be disclosed that the author is also convinced that Roman Catholic social thought is valuable when facing socio-economic issues, such as the current economic crisis and the need for sustainable development for all peoples of the world. Others have already given a positive evaluation of the contribution of the Roman Catholic social doctrine.² However, even if a reader does not share this positive evaluation of Roman Catholic social teaching, the academic purpose is merely to offer an analysis and interpretation that provides access to Roman Catholic social thought, and in particular to *Caritas in veritate*.

Structure of the study

The first part (A, chapters I – V) considers the social thought of the Roman Catholic Church. In order to clarify the nature and authoritative standing of an encyclical and counter potential misunderstandings, there will be an analysis of the meaning of ‘doctrine’, and its difference from ‘dogma’ (II.2). The discussion of Roman Catholic social thought will draw extensively on a reference work that has been put together by the Pontifical Council of Justice and Peace, the *Compendium of the social doctrine of the Church* (2004). This document is an official and exhaustive guide to social thought. Drawing on the *Compendium*’s historical account, the history of the social teaching of the Roman Catholic Church will be summarized (III), as well as its systematic basis in a few principles (IV). This will make the reader familiar with selected topics of the Roman Catholic Church’s social thought, as well as with expressions such as *fraternity*, *human integral development*, *human person*, and the concept of *development*, which have a particular and specific meaning in this context. The concluding chapter of this section (V) will analyse the topic of human labour and will give us the opportunity to offer some closing considerations about new developments (in the Latin of these documents sometimes called *res novae*), especially globalization.

The second part (B, chapters VI – VIII) is dedicated to an analysis of Benedict XVI’s social encyclical *Caritas in veritate*. Major questions are the continuity between this document and previous doctrines on social thought in topics such as, for instance, subsidiarity, solidarity and ecology, as well as original elements in this text. We will consider the influence of the encyclical *Populorum progressio* and the Second Vatican Council on *Caritas in veritate*, the possibility of a world authority in financial and economic matters, the logic of gift in the economic context, business ethics in the context of globalization of economy and ecology. A parallel issue that I will return to regards the dialogue between the Roman Catholic social teaching and the secular fields of expertise.

The concluding chapter (IX) recapitulates the main points of the study, reflecting on what I consider some strengths and weaknesses of Roman Catholic social doctrine.

² See D. K. FINN, Introduction, in D. K. FINN, ed., *The true wealth of nations. Catholic social thought and economic life*. New York: Oxford University Press, 2010. 4.

Abbreviations

Here is a list of most used abbreviations in this work. For each of the following references I have used the whole name when it was to be used for the first time in each chapter.

<i>AAS</i>	<i>Acta Apostolicae Sedis</i>
<i>Acta</i>	<i>Acta Leonis XIII</i>
<i>Caritas</i>	<i>Caritas in veritate</i>
<i>Catechism</i>	<i>Catechism of the Catholic Church</i>
<i>Compendium</i>	<i>Compendium of the social doctrine of the Church</i>
<i>Deus caritas est</i>	<i>Deus</i>
<i>Fides</i>	<i>Fides et ratio</i>
<i>Lumen</i>	<i>Lumen gentium</i>
<i>Nostra</i>	<i>Nostra aetate</i>
<i>Populorum</i>	<i>Populorum progressio</i>
RC	Roman Catholic
RCC	Roman Catholic Church
<i>Rerum</i>	<i>Rerum novarum</i>

About the works cited in the text

When there is a bibliographical source cited the numbers refers to chapters (capital Roman numbers, I, II, III, etc.), to pages of introductions or prefaces (small Roman numbers, i, ii, iii, etc.),or to the exact page of the book (Arabic numbers, 1, 2, 3, etc.).

References within the thesis itself are always by chapter, Roman numbers, followed by section, Arabic numbers.

For official documents of the Roman Catholic Church which are available online the numbers with citations refer to paragraphs and not to pages, as paragraphs are numbered in these online editions. When the full citation of an official document is quoted from *Acta Apostolicae Sedis*, numbers at the end of the quote are by page number, and numbers after the document's title refer to paragraphs. Full references of texts quoted are in the bibliography.

Part A

The Social Doctrine of the Roman Catholic Church

Chapter I – Themes in Roman Catholic social thought

1. Economic life, morality and social justice

We will start our analysis with a general examination of the view of the Roman Catholic Church (RCC) of the meaning of wealth and economics in general, and consequently its interpretation of the possible links between morals and economics. After these general lines we will be better prepared to analyse and reflect upon the social doctrine of the Roman Catholic Church and subsequently the content of *Caritas in veritate (Caritas)*.

What will be presented is a general introduction on social justice, morals and economics; business and private initiatives; and the role of economic institutions according to the Roman Catholic (RC) social doctrine. These will be the key issues treated here, always referring to their interpretation in the social teaching of the Roman Catholic Church. Also some conceptions, such as the role of private property in the social teaching will be introduced. In this part the key reference will be the *Compendium of the social doctrine of the Church (Compendium)*. Indeed, these are general topics which will recur when analysing more in detail the *Compendium*.

My intention in this opening section is to establish in the mind of the reader an intellectual framework in which it might be easier to inscribe and describe the specific approach of the *Compendium* and the basic standpoints of *Caritas*.

2. The Bible and the theologians of the early church on social justice and the administration of wealth

The RC social thought usually legitimizes itself by tracing its roots to the Old Testament as the initial source of religious ideas about economic life. After this, the Gospel is called upon to underline the social role of economics. In other words, social thought claims to draw principles and inspiration from the Bible. Studying examples of references to the Bible as from the *Compendium* may help us to familiarize with such a methodology frequently adopted in it.

With respect to the concentration of wealth, the Old Testament view about the rich and the poor is presented by the *Compendium* as a preparation for Jesus' message about material inequality. As the *Compendium* underlines, the principles present in the Old Testament express a perspective on richness and poorness that Jesus will complete with the 'light of his revelation'. In presenting us this perspective the *Compendium* claims to be faithful to the essential direction of the Scriptures and, at the same time, to give a reading of those same principles in an all-embracing view including all the social aspects.³ In other words, the RC social teaching claims that

³ See PONTIFICAL COUNCIL FOR JUSTICE AND PEACE, *Compendium of the Social Doctrine of the*

the economic message of the ancient covenant is brought to completeness in the new alliance. By referring to Jesus' words, social thought develops a punctual analysis from a traditional Christian perspective, which intends to give coordinates also referring to the contemporary world condition. That is why, in a later chapter, I will give some elements about the contemporary economic situation, in order to assess the meaning of the social teaching of the Roman Catholic Church in the contemporary economic setting.

The first thing I want to describe is the RC reading of the Bible, as found in the interpretation given by the *Compendium*, that allows a two-sided interpretation of wealth. From one side, the abundance of material goods is considered a blessing. It is seen as a good thing for living a better life. From the other side, richness and material goods are condemned, but only in regard of their bad use and not in an absolute sense. The *Compendium* indeed presents a list of Biblical passages where material injustices, usury and other forms of exploitation are seen as evil, especially when directed towards the poorest.⁴ With this latter approach the *Compendium* underlines the attention and care that God wants to reserve for the poor people and the responsibility that rich persons have towards them:

The prophetic tradition condemns fraud, usury, exploitation and gross injustice, especially when directed against the poor (see *Is* 58: 3 - 11; *Jer* 7: 4 - 7; *Hos* 4: 1 - 2; *Am* 2: 6 - 7; *Mic* 2: 1 - 2). This tradition, however, although looking upon the poverty of the oppressed, the weak and the indigent as an evil, also sees in the condition of poverty a symbol of the human situation before God, from whom comes every good as a gift to be administered and shared. [...] Poverty takes on the status of a moral value when it becomes an attitude of humble availability and openness to God, of trust in him. This attitude makes it possible for people to recognize the relativity of economic goods and to treat them as divine gifts to be administered and shared, because God is the first owner of all goods.⁵

The first part of this quote refers to material poverty, as to say the insufficiency of means of sustaining for the daily life. While the second part mainly refers to a condition of being poor before God, which is present throughout the Roman Catholic Church's social teaching.⁶ This latter ideal regards all people apart from their economic means, and their spiritual relation with the divine as thought of by the RCC. Notwithstanding the theological relevance of this latter kind of 'poorness', in this study when we will address the issue of poverty, or issues related to it, we will mainly refer to the first sort of poverty, material poverty.

When somebody is blessed with material richness, he/she is also endowed of the particular responsibility for the way it is used. Here social thought gives us a statement concerning the re-presentation of Jesus' words in the parable of the rich man (*Lk* 16: 19 - 31), concerning the sense of poverty in opposition to careless richness.

Social teaching develops this theme with reference to the New Testament. According to the *Compendium* Jesus gives meaning and sense to the eschatological

Church. Città del Vaticano: Libreria Editrice Vaticana, 2004. 325.

⁴ See *Compendium*, 323.

⁵ *Compendium*, 323 - 324.

⁶ See D. DORR, *Option for the poor and for the earth. Catholic social teaching*. Maryknoll, NY: Orbis Books, 2012. 13.

words that God has for the poor ones. In social thought's conception, the Christian duty lies in building the 'Kingdom'. The Christian mission regards the concrete construction of a social order in which attention for the least in society is the first social task. Within social teaching, any individual effort to help the poor is relevant because each time an individual acts towards improving the conditions for the poor we see the kingdom of God actually present in this world.⁷ Each Christian is called to contribute personally to social justice through everyday working activities. Furthermore, one should try to establish new socio-economic rules for a fair living. Alongside the responsibility we have for those who are close to us, we are implicitly considered to be accountable as well for others in the world that we do not know. As we will soon see, this is also the meaning of the connection of morals to economics.⁸ This being said, it remains the fact that according to social thought economic activity is a tool for the primary end of fulfilling God's call towards his reign. The *Compendium* presents this point as the RC interpretation of the Gospel. And here is how the RCC sees the true added value of Jesus' words to Old Testament laws:

*In the light of Revelation, economic activity is to be considered and undertaken as a grateful response to the vocation which God holds out for each person. [...] Good administration of the gifts received, and of material goods also, is a work of justice towards oneself and towards others. What has been received should be used properly, preserved and increased, as suggested by the parable of the talents (see Mt 25: 14 - 30; Lk 19: 12 - 27). Economic activity and material progress must be placed at the service of man and society.*⁹

The passage above proposes to understand the role of who possess something as an administrative role. The administration of material wealth should be pursued with social justice as its objective. Such stewardship means to act both for individual development and for the progress of society. We will come across these criteria again when facing the principle of the common good and the principle of the universal destination of goods.

Besides the Old Testament and the Gospel, another relevant source that the RC social thought addresses is the thinking of the 'Fathers of the church', especially those of the first centuries of Christianity. These are major persons who contributed to the stabilization of dogmas and doctrines through their reading of Biblical passages.¹⁰ Generally speaking, for the RC tradition a substantial reference and a practical list of those considered 'Fathers' can be the work of J.P. Migne that both concerns the Latin and Greek Fathers, the *Patrologia graeca* and *Patrologia latina*. Indeed, also the *Compendium* quotes those texts with the reference from the Migne's volumes. Within the *Compendium* they are called more generally 'Church writers'.

⁷ See *Compendium*, 325.

⁸ In the *Compendium* we find this concept expressed in this way: '*If economic activity is to have a moral character, it must be directed to all men and to all peoples. [...] If, to some degree, everyone is responsible for everyone else, then each person also has the duty to commit himself to the economic development of all (see JOHN PAUL II, *Sollicitudo Rei Socialis*. 32, AAS 80, 1988. 556 – 557). This is a duty in solidarity and in justice, but it is also the best way to bring economic progress to all of humanity.*' *Compendium*, 333.

⁹ *Compendium*, 326.

¹⁰ See also the first part of G. FROSINI, *Il pensiero sociale dei padri*. Brescia: Queriniana, 1996.

We have to remember that the social teaching of the Fathers of the church is something that has been extrapolated from their whole pastoral teaching. It was not a teaching on 'social' things in the strict technical sense we may use today. In their writings the moral level is central. Thus, problems like, for instance, the distribution of wealth or the relationship between state and church, were often addressed, but not with the technical specificity we see today.¹¹

Some of the Fathers are considered to demonstrate that the first concern of a Christian should not be directed so much towards a specific institutional or ideological framework of society. Rather, social thought wants to touch the individual's personal conscience, as each citizen is called to contribute to the sharing of goods. Obviously, it is possible that an institutional framework may help people in reaching their purposes, but in the end persons always make institutions, public or private. That is what the *Compendium* still sees as a focal point. Indeed, it seems that in focussing on these words from the Fathers the *Compendium* emphasizes the priority of individual responsibility as the right track for treating very similar topics today, such as the distribution of wealth in the world.

In this view what is central is the struggle of the individual against egoistic tensions. In contrast to what is considered any sort of irrational accumulation of material wealth, the individual is called to promote the realization of the common good by using private possessions in the service of a larger community. It might be worthwhile to read the following passage because it shows a sort of continuity between past problems and the social teaching of today:

Goods, even when legitimately owned, always have a universal destination; any type of improper accumulation is immoral, because it openly contradicts the universal destination assigned to all goods by the Creator. Christian salvation is an integral liberation of man, which means being freed not only from need but also in respect to possessions. 'For the love of money is the root of all evils; it is through this craving that some have wandered away from the faith' (1 Tim 6: 10). The Fathers of the Church insist more on the need for the conversion and transformation of the consciences of believers than on the need to change the social and political structures of their day. They call on those who work in the economic sphere and who possess goods to consider themselves administrators of the goods that God has entrusted to them. *Riches fulfil their function of service to man when they are destined to produce benefits for others and for society.* (see *The Shepherd of Hermas*, Liber Tertium, Allegory. I, PG 2, 954.) 'How could we ever do good to our neighbour', asks St. Clement of Alexandria, 'if none of us possessed anything?' (CLEMENT OF ALEXANDRIA, *What Rich Man Will Be Saved?* 13, PG 9, 618). In the perspective of St. John Chrysostom, riches belong to some people so that they can gain merit by sharing them with others (see SAINT JOHN CHRYSOSTOM, *Homiliae XXI de Statuis ad Populum Antiochenum Habitaе*. 2, 6 - 8, PG 49, 41 - 46). Wealth is a good that comes from God and is to be used by its owner and made to circulate so that even the needy may enjoy it. Evil is seen in the immoderate attachment to riches and the desire to hoard. St. Basil the Great invites the wealthy to open the doors of their storehouses and he exhorts them: 'A great torrent rushes, in thousands of

¹¹ See R. CHARLES, *Christian social witness and teaching. The Catholic tradition from Genesis to Centesimus annus*. Leominster, MA: Gracewing, 1998. 75; P. De LAUBIER, *La pensée sociale de l'Eglise catholique. Un idéal historique de Léon XIII à Jean Paul II*. Fribourg: Éditions Universitaires, 1986. Prologue.

channels, through the fertile land: thus, by a thousand different paths, make your riches reach the homes of the poor' (SAINT BASIL THE GREAT, *Homilia in Illud Lucae, Destruam Horrea Mea*. 5, PG 31, 271). Wealth, explains Saint Basil, is like water that issues forth from the fountain: the greater the frequency with which it is drawn, the purer it is, while it becomes foul if the fountain remains unused (see *ibid.*). The rich man - Saint Gregory the Great will later say - is only an administrator of what he possesses; giving what is required to the needy is a task that is to be performed with humility because the goods do not belong to the one who distributes them. He who retains riches only for himself is not innocent; giving to those in need means paying a debt (see SAINT GREGORY THE GREAT, *Regula Pastoralis*. 3, 21, PL 77, 87. Title of § 21: *Quomodo admonendi qui aliena non appetunt, sed sua retinent; et qui sua tribuentes, aliena tamen rapiunt*).¹²

This long quote summarizes one of the most relevant interpretations of the Sacred Scriptures in the social thought of the Roman Catholic Church. From the beginning there is a particular statement that will be a basic assumption also in the further analysis of social teaching: private property should be used for general welfare. This is the result of the reading of the Bible in the texts of the Fathers of the church as selected by the editors of the *Compendium*.

What we have read above can raise some questions about the treatment of private property in the social teaching of the RCC. We will see later, more specifically, that private property is recognised as a natural right since the social encyclical *Rerum novarum*, but that this does not give the respect for private property a higher status than the principle of the universal destination of goods. Each individual is called to participate in the realization of a shared wealth. Sharing private possessions is a higher value than its personal use. Social thought develops a doctrine according to which the use of something is more important than the possession of something. Thus, in the perspective of Roman Catholic social thought, possessing is merely propaedeutical to its final use, which is sharing. In this discourse, a word used in the *Compendium* is indeed 'administrator'. Persons who possess goods should see themselves not as mere possessors but as administrators of those goods. This is the way they can detach themselves from greedy possession and operate for the common good. In relation to this we will have an indication that the right to private property is under discussion, notwithstanding the fact that it is defined as a natural right of the human being.

3. Morals and economic life

The *Compendium* considers Pius XI's *Quadragesimo anno* and the pastoral constitution of Vatican II *Gaudium et spes*, as official documents of the RCC that serve to see the Catholic point of view on the relationship of morals and economics.¹³ Some developments regarding this relationship will be present in almost each of the following chapters of this study, as this is one of the most frequent topics in social teaching.

¹² *Compendium*, 328 – 329.

¹³ See *Compendium*, 330 – 331.

It is in the public debate about business ethics, as it is usually referred to today, that we see the dominant understanding of economic behaviour as standing in relation to something else, namely morality. In such secular discourse, morality is frequently treated as totally different from economics and external to it. RC social thought agrees to a certain extent: we can distinguish certain principles, both in morals and economics, and see how these are justified in relation to their specific grounds. Nevertheless, as the *Compendium* points out as well, to distinguish something is not the same as to separate it.

According to Roman Catholic Church's social thought, as will be seen in the following quotations, morality and economy are interwoven human activities. More precisely, social teaching states that the ultimate end of economic activity belongs to the moral order. In this regard, the ultimate end of economics is something that regards its activity, but does not totally belong to the field of economic science. Philosophically speaking, we could say that the role of morals according to social thought is something that transcends the economic order. In this perspective, economics uniquely does have the task, which is not final, of producing wealth, distributing it and consuming it.

In other words, we should find ways to administrate scarce resources in a profitable way but profit cannot be the ultimate end, for if this would be the ultimate end, economics would have an end in itself. In Roman Catholic Church's social thought, profit is considered an indicator of the quality of economic actions, but it does not exhaust the end of economics. Hence, in social thought's perspective, scientists in economics should accept a certain degree of openness in their object of study for something that does not entirely belong to their intellectual order.

The position of the RCC also involves the entrepreneur as an economic actor. The entrepreneur should be aware of a specific role within society in mediating wealth. RC social teaching sees the entrepreneur as a partner in the production of wealth, but also as a part of the distribution of wealth when workers are employed. Exactly here, in regards to the workers should primarily appear the moral concern of any economic activity:

The social doctrine of the Church recognizes the proper role of profit as the first indicator that a business is functioning well: 'when a firm makes a profit, this means that productive factors have been properly employed.' (JOHN PAUL II, *Centesimus Annus*. 35 AAS 83, 1991. 837). But this does not cloud her awareness of the fact that a business may show a profit while not properly serving society. (see *Catechism of the Catholic Church*. 2424). For example, 'it is possible for the financial accounts to be in order, and yet for the people - who make up the firm's most valuable asset - to be humiliated and their dignity offended.' (*Centesimus*, 35). This is what happens when businesses are part of social and cultural systems marked by the exploitation of people, tending to avoid the obligations of social justice and to violate the rights of workers. [...] A business enterprise must be a community of solidarity (*Centesimus*, 43), that is not closed within its own company interests. It must move in the direction of a 'social ecology' (*Centesimus*, 38) of work and contribute to the common good also by protecting the natural environment.¹⁴

¹⁴ *Compendium*, 340.

Social teaching sees profit as an important indicator of the economic health of any economic enterprise. Profit provides evidence that an enterprise is functioning properly. Making profits means to reach a level of economic independence that is desirable for any company. However, looking for profits is not considered an absolute aim, as one may also evaluate the contribution of an economic actor to the common good. According to the *Compendium* to have profits, even huge profits, does not mean that the general behaviour of the enterprise is desirable. The RCC states that it is unworthy to reach profits if they frustrate other elements, for instance the protection of the environment or the working conditions. Thus, not only profit is relevant but also how that profit is reached.

Social teaching speaks of a ‘community of solidarity’ referring to an enterprise. This solidarity should be intended both at the internal level, namely allowing the solidarity among workers, and the solidarity with those who are not immediately connected to the company. We will return to this solidarity with that which is outside a company in later chapters. This external solidarity includes ecological issues and the general well-being of people. As far as it is possible now, this may be understood as a practical particular exemplification of the relation between business and morals.

But the *Compendium*, while defining what economy is about, namely that process of producing, distributing and consuming goods, also gives us the opportunity to have a more general overview of that relationship according to social thought. In saying that all actions with economic relevance should be directed towards the social well-being of people, social teaching sets its basic assumption for proposing its view of the intrinsic link between morals and economics:

*The relation between morality and economics is necessary, indeed intrinsic: economic activity and moral behaviour are intimately joined one to the other. The necessary distinction between morality and the economy does not entail the separation of these two spheres but, on the contrary, an important reciprocity. [...]. This is so because the purpose of the economy is not found in the economy itself, but rather in its being destined to humanity and society (Catechism, 2426). The economy, in fact, whether on a scientific or practical level, has not been entrusted with the purpose of fulfilling man or of bringing about proper human coexistence. Its task, rather, is partial: the production, distribution and consumption of material goods and services.*¹⁵

In the perspective proposed in the *Compendium*, morality represents the possibility for the fulfilment of the economic action. The true end of economics is a moral end. Economy when taken by itself, according to social teaching, runs the risk of subduing human persons to the task of producing profit as if that were the definitive end. In such a case the economic actors would not be operating at the service of human being, as social doctrines intends. In contrast to the focus on profit in itself, economy should be directed according to the priorities of the common good in society. Setting such an end for economic actions, includes within the economic perspective awareness that all the activities embraced in it, such as production, distribution and consumption, are not ends, but means to be used for service of humanity.

¹⁵ *Compendium*, 331.

By emphasizing the greater end of economic actions, social teaching opposes a certain materialistic perspective. This view, translated in economic terms, would propose that the true satisfaction of human beings as exclusively, or at least primarily, comes from material goods and richness. This opposition to a materialist attitude is indeed always present, albeit sometimes implicitly, in most of the critical lines of the *Compendium*. In this sense, the Roman Catholic Church states how leaving the economy to work independent from any ethical concern would end in the oppression of persons by their material needs instead of freeing them, because the possession of goods and the accumulation of capital would be the only ultimate economic ends accepted.¹⁶

What is criticized, in the social teaching is the consumerist society in which development and growth are closely related, if not identified, with rates of production and consumption. This is what social teaching strongly addresses as a problematic issue. Thus, we may say that, in this perspective, the quality of the economic action measured by strictly technical tools should never be separated by the concern on the quality of that economic activity at the level of the well-being of people.

We come in the end to see exactly how the *Compendium* expresses the relation of morals and economics. Namely, there must be a moral concern behind each economic activity, from how a good is produced to the motivation lying at the basis of his consumption:

The moral dimension of the economy shows that economic efficiency and the promotion of human development in solidarity are not two separate or alternative aims but one indivisible goal. Morality, which is a necessary part of economic life, is neither opposed to it nor neutral: if it is inspired by justice and solidarity, it represents a factor of social efficiency within the economy itself. The production of goods is a duty to be undertaken in an efficient manner, otherwise resources are wasted. On the other hand, it would not be acceptable to achieve economic growth at the expense of human beings, entire populations or social groups, condemning them to indigence. [...] Development [...] cannot be reduced to a mere process of accumulating goods and services. On the contrary, accumulation by itself, even were it for the common good, is not a sufficient condition for bringing about authentic human happiness. In this sense, the Church's social Magisterium warns against the treachery hidden within a development that is only quantitative, for the 'excessive availability of every kind of material goods for the benefit of certain social groups, easily makes people slaves of 'possession' and of immediate gratification [...]. This is the so-called civilization of 'consumption' or 'consumerism' (*Sollicitudo*, 28).¹⁷

¹⁶ A passage from *Centesimus annus*, social encyclical of John Paul II, can clarify this better: '[...] economic freedom is only one element of human freedom. When it becomes autonomous, when man is seen more as a producer or consumer of goods than as a subject who produces and consumes in order to live, then economic freedom loses its necessary relationship to the human person and ends up by alienating and oppressing him.' *Centesimus*, 39.

¹⁷ *Compendium*, 332, 334. Indeed, very different modern and contemporary scholars searched for these decisive concepts and searched for the meaning of happiness in industrial and post-industrial societies. Among the many, it may be seen probably the same idea behind social thought's conception and Erich Fromm's work on 'to have or to be'.

According to the Roman Catholic social thought each economic actor within the economic system has social and moral responsibility for his actions. Since consumption is the main activity of the consumer, consumers have a moral responsibility in going against a consumerist mentality. The fact that consumers in a consumerist society might lack a degree of self-awareness, or risk to consider themselves only as consumers has been underlined also in the sociological perspective of Zygmunt Bauman.¹⁸

In Roman Catholic social thought the consumer, as an economic actor, is always considered a person and thus a moral agent. Consumerism, on the other side, would reduce the whole person to the mere role of buyer without any moral concern. Consumers when behaving responsibly, have the concrete possibility to influence and direct economic processes in new ways of sustainable development. In such a view, acting responsibly is not reduced to a particular choice of an ethically branded product in the supermarket, albeit this is a contribution too. More in depth, the social doctrine of the RCC calls for a different mentality that might cause a radical shift in our attitude towards the way we act in any economic context. This approach to the economic actions implies that persons try to evaluate and take into account the different results given by the economic options that are in front of them. This is how the *Compendium* expresses the concept of making our economic choices in order to achieve a moral demand for social justice:

Purchasing power must be used in the context of the moral demands of justice and solidarity, and in that of precise social responsibilities. One must never forget ‘the duty of charity [...], that is, the duty to give from one’s ‘abundance’, and sometimes even out of one’s needs, in order to provide what is essential for the life of a poor person’ (Centesimus, 36). This responsibility gives to consumers the possibility, thanks to the wider circulation of information, of directing the behaviour of producers, through preferences - individual and collective - given to the products of certain companies rather than to those of others, taking into account not only the price and quality of what is being purchased but also the presence of correct working conditions in the company as well as the level of protection of the natural environment in which it operates.¹⁹

Thus, in the perspective of the *Compendium* the economic power of consumers starts with choosing what to do with their money.

In this case, the efforts of social teaching are directed towards the objective of shaking people’s awareness. Social teaching points out that even the individual consumer can play a decisive role for a more fair economy. There is the chance that in their actions as consumers, individuals can do something important for global issues. Consumers, individually or collectively, have this possibility when the choice between two products takes into account also characteristics other than price and quality. The evaluation of a good, in this sense, should include for instance also the working conditions and environmental sustainability in the production process.

¹⁸ See Z. BAUMAN, *Consuming life*. Cambridge: Polity Press, 2007.

¹⁹ *Compendium*, 359.

There is then a struggle against what appears to the RCC to be something that is a wide-spread and strong mentality. This is one that pervades every corner of our society and deals with the instant gratification given by material goods. To go in the opposite direction means to renounce to something present for having another sort of gratification later in time. And, moreover, there is a call for that feeling of fraternity that would open our attitudes to be sensitive also towards problematic issues that are sometimes very far, geographically speaking, from us. In the view of social teaching, this awareness is nothing but implemented by the huge amount of information that we can have thanks to the technological developments. In other words, a responsible consumer is one who makes choices on the basis of the information available, with the objective of purchasing in a sustainable way. A responsible consumer, as social thought describes it, would not buy a product only on the basis of the amount of money saved.

4. Institutions in economy and their role

Though the responsibility of individual persons is primary, social thought does regard the role and functions of three main economic institutional entities: market, state and intermediate bodies. The presence of these institutions relates to the scarcity of resources in front of the huge number of potential users or consumers. The strategy adopted to solve this problem refers to the economizing principle, which calls for the most rational possible use of scarce resources through the creation of and the use of institutions.²⁰ As the *Compendium* understands them, economic institutions are made principally to fulfil this principle. Their reason to be is to work in favour of the best possible ways in producing and distributing resources, means and final goods.

These institutions might appear in concrete reality more or less mixed or separated; this may depend from many factors not merely economical but also traditional, cultural or political. Social teaching individuates these institutions in their most common forms of market, state and intermediate bodies. The following analysis places these entities in the framework of Roman Catholic social thought. Though the three will be treated in separate sections upon the view of RC social thought to realize the economizing principle there is the need to have a fruitful interaction between these three.

4.1. The market

Social thought brings us arguments for the utility of a free-market in society. The free-market is probably the best mechanism if we want to trade things. This characteristic is identified in the Roman Catholic Church's social teaching with the capacity to satisfy individual personal needs while making possible the encounter of different interests in the same environment through contractual agreements. Simplifying, money and goods are exchanged by different persons that are looking for something owned by another. In this sense, in the perspective of social teaching, the market is the best tool for letting interests of diverse people coincide.²¹

²⁰ See *Compendium*, 346.

²¹ In the *Compendium* it is indeed stated that: 'There are good reasons to hold that, in many

This view of the free market appears to be widely shared among economists, sociologists and experts in political philosophy. To evaluate positively the free market is common to those who support liberal economic settings. At the same time, even among those pushing for a regulated market, the free market is not denied its utility. It can be reasonably said that the free market has recognized a role that, *ceteris paribus*, no other economic institution can play.

The RCC recognizes the value of trading in a free market, but social teaching tries to not ignore problems related with an eventual lack of regulation of market's mechanisms.²² We may understand the meaning of the free market as understood in social teaching in the following terms: it is necessary to have in society a free institution that guarantees that the interests of different people meet, but there is the need also to guarantee that the laws of economic profit are not overwhelming human moral laws within the market environment. This latter guarantee should be furnished by other external institutions. In brief, according to social thought, even within a free market environment human rights come before economic interests. This can be considered a specification and application of what said in the previous section about morals and economics.

Thus, the appreciation of the free market needs at the same time more consideration of its proper limits to counterbalance an eventual unlimited force of the market. The market works, according to social thought, only when its role is clear and defined, only when competition is allowed and encouraged through regulation. In social thought's view, if competition is really a decisive element in the functioning of the market there is the need to guarantee that there is competition.²³

The competition among different actors is considered one of the fundamental pillars for the functioning of the free market. Without any legal framework a free market has the risk that the strongest dominates over the weakest. Moreover, we can find in social thought a clear statement against what can be called a 'totalitarian expression' of the market. Social teaching is concerned about 'idolatry', an absolutization of market practices. Social thought points out that the consequences of allowing an exaggerated expansion of the market mentality based on the supremacy of profits and material gain would be hazardous. Profit-based mechanisms in the market might become the ultimate criterion of evaluation in any case. In other words, within an unconstrained free market literally everything can become part of market transactions; every thing can become a good and consequently be traded according to market laws. In the end, as a worst case scenario, also human beings can be partially or entirely considered goods and profit can be made upon them:

The Church's social doctrine, while recognizing the market as an irreplaceable instrument for regulating the inner workings of the economic system, points out the need for it to be firmly rooted in its ethical objectives, which ensure and at

circumstances, 'the free market is the most efficient instrument for utilizing resources and effectively responding to needs' (*Centesimus*, 34).' *Compendium*, 347.

²² See *Compendium*, 350.

²³ A number of concrete measures is also listed in the *Compendium*: '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 and conservation of resources, rewarding entrepreneurship and innovation, making information available so that it is really possible to compare and purchase products in an atmosphere of healthy competition.' *Compendium*, 347.

the same time suitably circumscribe the space within which it can operate autonomously (see PAUL VI, *Octogesima Adveniens*. 41, AAS 63, 1971. 429 - 430). The idea that the market alone can be entrusted with the task of supplying every category of goods cannot be shared, because such an idea is based on a reductionist vision of the person and society (*Centesimus*, 34). Faced with the concrete ‘risk of an ‘idolatry’ of the market’, the Church’s social doctrine underlines its limits, which are easily seen in its proven inability to satisfy important human needs, which require goods that ‘by their nature are not and cannot be mere commodities’ (*Centesimus*, 40; see *Catechism*, 2425), goods that cannot be bought and sold according to the rule of the ‘exchange of equivalents’ and the logic of contracts, which are typical of the market.²⁴

In analysing these points, we can observe two main issues. The first regards the market’s inner laws. It is stressed how in this purely economic environment we need some regulating principle that for reasons of counter-balance should not belong to the same market. Control over market practices, might be more effective if it is external.

The second point argues that, in any case, certain things cannot become tradable goods and cannot be subdued to the market’s mechanisms. Social teaching points out that when the market is seen as the leading economic institution, outside of which there is no chance for economic development, then we observe that in the eyes of its most tough advocates the market becomes the economic God. We might try to figure out which can be these goods that in social thought’s view cannot be traded according to the logic of the equivalents. Probably an assumption like this will be less implicit when reading more in detail certain passages of *Caritas* or the *Compendium* later on. It should emerge how for the RCC a certain degree of free-giving practices, guided by the logic of the gift, is an expression of the fraternal love among human beings. This sort of logic, the logic of the gift, may not be suitable in an environment where the only logic accepted is that of the equivalents. This appears to be, in the end, the decisive elements for which social teaching preaches openness to the actors in the market for ‘other’ ways of exchange.

Thus, in this view, the market and its specific mechanisms are important, but not absolutely important. Roman Catholic Church’s perspective sees the market as a relevant institution in satisfying certain material needs, but it also claims that there are some human needs that could never be fulfilled through the market. This is due to the fact that social thought recognizes that certain things that human beings need are not commodities. Commodities are probably the only thing that can be traded with the market’s practices and laws. This can be seen as a limit, but also a helpful definition of the specific identity of the market.

4.2. The state

Regarding the state’s activity in the economic field there are mainly two principles that will be treated more in depth later on. The first is the subsidiarity principle, which affirms that the state should not interfere when private actors are exerting their economic freedom within a legal framework. According to this principle public

²⁴ *Compendium*, 349.

institutions should be a *subsidiium*, namely a helping hand when private institutions or individuals are not able to satisfy their necessities alone.

Second, there is what social teaching calls the solidarity principle. The state has to intervene directly, according to social thought's solidarity principle, when public institutions have to protect the weakest economic actors, preventing situations such as private monopolies or oligarchies.

To be efficient, these principles need to be applied with a certain balance. If the state were to leave full autonomy to private subjects, in a lax application of the principle of subsidiarity, a sort of local egoism could be implemented. There is the risk that private actors without any institutional regulations will try to dominate public institutions and forget the end of the common good. While, on the other side, a too intense application of the solidarity principle can easily degenerate into a state focused too much on public assistance. Namely a state in which services and goods that could be easily and better offered by private agents are monopolized by state's activity. The state, in other words, should act respectfully of private interests with, at the same time, a vigilant consideration about the economic destiny of all the actors involved, particularly the disadvantaged ones.

In this regard, the *Compendium* proposes a difficult balance between, on one side, encouraging private initiatives through institutional structures and, on the other side, an effective, balanced and rational intervention directed to the always present end of the general well-being of people.²⁵ Keeping in mind the inter-connected activity of these two principles, we have now to say that the state's role, according to social thought, is also accomplished when it simply furnishes those determinant guarantees, as stability in monetary exchange and efficient public services, without which it would be impossible even to think of an economic environment. More concretely, according to social thought, the state's role in the economic field:

[...] is that of determining an appropriate juridical framework for regulating economic affairs, in order to safeguard 'the prerequisites of a free economy, which presumes a certain equality between the parties, such that one party would not be so powerful as practically to reduce the other to subservience' (*Centesimus*, 15). Economic activity, above all in a free market context, cannot be conducted in an institutional, juridical or political vacuum. 'On the contrary, it presupposes sure guarantees of individual freedom and private property, as well as a stable currency and efficient public services' (*Centesimus*, 48; see *Catechism*, 2431). [...] There exist certain sectors in which the market, making use of the mechanisms at its disposal, is not able to guarantee an equitable distribution of the goods and services that are essential for the human growth of citizens. In such cases the complementarities of State and market are needed more than ever.²⁶

It is interesting to notice how in this passage it is written that a 'certain equality between the parties' is 'prerequisite of a free economy'. When economic actors are not encountering any juridical barrier there is a concrete risk that someone else could

²⁵ See *Compendium*, 351, 354. In the worst case: ' [...] the State becomes detrimental to society: a direct intervention that is too extensive ends up depriving citizens of responsibility and creates excessive growth in public agencies guided more by bureaucratic logic than by the goal of satisfying the needs of the person (see *Centesimus*, 48)'. *Compendium*, 354.

²⁶ *Compendium*, 352 – 353.

be practically crushed. And, in social teaching's view, the measures adopted by the state to prevent such things should not be seen as a limitation of freedom for someone, but as a protection of the weakest.

In the Roman Catholic Church's economic teaching, equality and freedom are two core terms for understanding the interaction between state and market. The focal point in social thought is that a proper and fair regulation by the state would not mean less freedom in the market environment. We rather we should find a market functioning alongside the state in co-operation. This view is due to the fact that social teaching sees the end of an economic setting not in the market's success in allocating goods, nor in the state's ability in tracking economic transactions, but in the well-being of people. In this sense the state guarantees a legal framework to the market in which economic actors can freely operate. Moreover, the state is seen as the institutional actor that guarantees for all the economic actors certain things, for instance private property and public services.

Social teaching sees the market and the state as two elements that balance each other within the same economic setting.

4.3. *The intermediate bodies*

With the expression 'intermediate bodies' social teaching refers to the whole range of civil organizations between the state and the market. These bodies represent alternative ways for satisfying civil needs and for accomplishing the objective of the common good according to social thought. This is probably due to the greater capacity of civil organizations to detect particular social needs. According to the perspective proposed by the *Compendium*, state and market may ignore certain human necessities, or fail to satisfy them, due to their bureaucratic devices and also because in such cases they would be dealing with particularly delicate categories of goods that can only be used in collective ways.

We observe that often associations of private citizens do not pursue profit as their main end, but they rely on a moral choice to serve society, for example in the case of NGOs. As this is their main characteristic it is obvious that within the market mentality they would sometimes encounter practical barriers. That is why the state should compensate and help such organizations in their development. Such organizations could give a contribution to general welfare in filling some gaps left by policies that are thought to be exclusively market oriented. In this way certain operative costs of the bureaucratic apparatus can be saved or diminished:

*The social-economic system must be marked by the twofold presence of public and private activity, including private non-profit activity. [...] The use of certain categories of goods, collective goods and goods meant for common utilization, cannot be dependent on mechanisms of the market (see *Centesimus*, 40), nor does their use fall under the exclusive competence of the State. [...] Civil society, organized into its intermediate groups, is capable of contributing to the attainment of the common good by placing itself in a relationship of collaboration and effective complementarities with respect to the State and the market. It thus encourages the development of a fitting economic democracy. In this context, State intervention should be characterized by a genuine solidarity, which as such must never be separated from subsidiarity.²⁷*

²⁷ *Compendium*, 356.

According to social thought, we do not have necessarily to face a conflict between intermediate groups and the presence of the market or the state. What is needed is cooperation among them. In the position stressed by RC social thought, the market, due to its proper way of functioning, cannot serve society in relation to the use of certain collective goods; then, the state is not the exclusive or absolute owner of such collective goods and the dimension of its bureaucratic apparatus could slow down the process of making these goods shareable. Therefore, particular goods that usually belong to the natural environment, such as water or land might be better preserved and used when at the service of the whole citizenry. In addition to this, social teaching sees that for such goods the co-operation between civil bodies, market and state represents the expression of the subsidiarity and solidarity principles. We are going to see later in detail these two principles. We can say that the expression of these principles is put in practice in leaving open for the intermediate bodies an institutional space for pursuing their own objectives.

5. The ‘new things’ in the economic world

With the expression ‘*res novae*’, new things, contemporary social teaching refers primarily to globalization and its consequences in the social context. Indeed, we might argue that globalization with all its corollary topics, heavily sets the agenda of the RC social teaching of today. One thing to take into account is, of course, that such a phenomenon takes place with the strong support of progress in information technologies and the evolution and development of means of transport, making various part of the world the world permanently connected. Furthermore, the world of today is so much interwoven that modifications in one part of the globe have influences in an area that is geographically far away. In a sociological perspective, according to Anthony Giddens, globalization is defined as:

[...] the intensification of worldwide social relations which link distant localities in such way that local happenings are shaped by events occurring many miles away and vice versa.²⁸

We should keep this definition in mind, because each time there is a reference to globalization, this may represent a synthetic and practical indication of what we are referring to. The *Compendium*, indeed, starts summarizing elements present in globalization. Thus it is recognized the integration of national economics, especially through the means of the financial economy.²⁹

From a socio-economic perspective, social thought defines globalization as a process of integration regarding the entire range of economic aspects in different national economies. At the micro-economic level, the actors expand their horizons to global perspectives, which means that geographical positions are no more determinant for buying and selling goods or services. This process implies a generalized liberalization of trades and financial tools. In this regard, social teaching speaks also of a global economy more and more relying on financial means than on real economy. Distances in world trade are cut, thanks both to financial means and

²⁸ A. GIDDENS, *The Consequences of Modernity*. Stanford: Stanford University Press, 1990. 64.

²⁹ See *Compendium*, 361.

technological development; the improvement in international transportation of goods has helped to diminish their price.

The *Compendium* acknowledges the central role of the financial economy in letting this process of approaching and exchanging among countries grow. Financial institutions have been the main intermediate subjects in the global expansion of economy, and as a result today we observe how transactions in financial markets surpass those in the real economy. All these processes have been influencing and implementing each other reciprocally, in such a way that the general process of globalization has enormously widened its influence, in the sense that, according to social teaching, today no national state can ignore the effects of globalization and cannot avoid a dialogue with financial investors.³⁰ Behind this sort of globalization of the opportunities, social thought sees that there is also the other face of the coin. If financial means have helped capital's mobility, they have increased thereby the auto-referential character of this type of market institution. Namely, in the interpretation given by social teaching, there is a concrete risk for an unbalanced deregulation of the financial tools:

In light of the extreme imbalance that characterizes the international financial system, the overall picture appears more disconcerting still: the processes of deregulation of financial markets and innovation tend to be consolidated only in certain parts of the world. This is a source of serious ethical concern, since the countries excluded from these processes do not enjoy the benefits brought about but are still exposed to the eventual negative consequences that financial instability can cause for their real economic systems, above all if they are weak or suffering from delayed development (see JOHN PAUL II, *Address to the Pontifical Academy of Social Sciences* 25 April 1997, 6, *L'Osservatore Romano*, English ed., 14 May 1997, p. 5). [...] It is therefore indispensable to introduce a normative and regulatory framework that will protect the stability of the system in all its intricate expressions, foster competition among intermediaries and ensure the greatest transparency to the benefit of investors.³¹

In other words, social thought is concerned that financial capital might be detached from the real economy, and instead of working at the service of economic development, a few operators could gain control of enormous capital. Furthermore, speculation might become an automated praxis and irresponsible investors are able to cause abnormal damages even to economies of entire countries. As there is no uniform global regulation of financial processes, the *Compendium* points out, the world of finance runs the risk of being divided into zones according to the financial regulation present in each. Within this perspective, this situation will implement inequalities and under-development.

As we will see more in detail when analysing the content of *Caritas*, a reform in the world financial system, with uniform rules and a stable independent world authority, is something that social thought seeks as a possible solution for such problems. The wish of reformation for the global financial system has been specifically addressed more recently by a dedicated document developed by the Pontifical Council for Justice and Peace. The Council proposes the creation of a global authority able to fill the normative gaps that partially feed the contemporary

³⁰ See *Compendium*, 361 – 362.

³¹ *Compendium*, 369.

economic crisis.³² The aim of the *Compendium*, the document from *Justitia et Pax*, and *Caritas*³³ is for a legal framework able to guarantee the transparency of the markets.³⁴

What has been said until now about the globalization process is in the view of the RCC, two-sided. From one side, globalization can be seen as a huge opportunity for development, because of the global attitude that the market has now gained. But, at the same time, it is also possible that a few economic actors take advantage of their privileged positions, gaining all, or the large part of, the material benefits of this process and consequently excluding a large majority of people from these opportunities. In the opinion expressed by the *Compendium*, this can happen because industrialised countries start from an advantageous position compared to developing countries. Moreover, social teaching recognizes three other factors that bring inequality among the world's countries. First, developing countries often are too weak to influence the decision-making processes in the international organization's agreements. Second, they experience corruption as ordinary in their politics, and this can be said also about some industrialised states. Third, they are missing fundamental institutions at all levels of their bureaucratic system.³⁵

Social teaching also includes the idea that for having the fruits of globalization better distributed among world populations, there is the need of having among those same peoples equal starting points in learning and education. It might not be enough to liberalise trades and goods, when in developing countries are missing freedoms related to citizenship, as freedom of speech or freedom to association. Alongside this, in social teaching's standpoint, advantaged countries should act according to principles that I will later present, above all the principles of solidarity and the principle of the common good. As we will see, these should orient economic decisions of countries. Otherwise, this is the point, the result of globalization would not be a worldwide-shared development, a globalization of opportunities, but a global process of enrichment only for a few, a globalization of disadvantages.

6. *The place of economy*

An important concern that social teaching puts forward is the re-evaluation of the position of economic life in our social life. Indicators of the economic success, such as profit making and cost reduction, are too often identified with happiness. The view that social thought criticizes assumes that the central role we attribute now to economy reflects a generalized perspective that takes for granted a life style exclusively concerned with material questions. According to the social teaching of the RCC, part of the solution lies in introducing, or re-introducing, in social life ethical positions and religious perceptions concerning

³² See PONTIFICAL COUNCIL FOR JUSTICE AND PEACE, *Towards reforming the financial and monetary systems in the context of global public authority*. Vatican City, 2011.

³³ See *Caritas*, 47, 65.

³⁴ See *Towards reforming the financial and monetary systems*, 16; A. VACCARO, A. J. G. SISON, Transparency in business: the perspective of Catholic social teaching and the 'Caritas in veritate', in *Journal of Business Ethics*, 100. 2011. 17 – 24.

³⁵ See *Compendium*, 362.

the economic life of human beings. In the end, this is the main reason why social teaching is here.

Social thought does not acknowledge that economy alone truly represents the centre of human social life even if it represents a substantial part. For instance, the *Compendium* tries to show that while we put material and economic activities as the most relevant ends in our social life, we are building a society worried exclusively about two things: production and consumption, both of goods and services. A similar analysis has been offered by many scholars and thinkers; in the twentieth century, and particularly in the sixties and seventies of that century, many criticized the society of consumption. Among these, Erich Fromm emphasized the psychological risks of a society based on consumption. It is not our intention to analyse singularly the thought of such thinkers, their points of contact and differences, but it might be relevant to remember in this context their contribution to the criticism of the capitalist and market-oriented society of their times. It might not appear so unexpected that there is such a parallel between social teaching and some secular standpoints. From the Second Vatican Council (1962 – 1965) came the express request for an open look at developments in fields like psychology and sociology.³⁶

In the next chapter there will be occasion to be more precise about the consequences of a consumerist society on the people, according to social thought. For now we can say that, according to social teaching, we might become inhumane, precisely because we lose our religious and ethical dimension. According to this view, we are no longer able to discern the proper relevance and hierarchy among things like economy, ethics and religion. This happens, for instance when economic activity, intended as production and consumption, is considered the most important end of the social life. In this perspective, social teaching argues that we will experience alienation and lack of sense. And albeit we are potentially extremely successful in producing material wealth, we could be drastically limited in finding our happiness exactly in that material abundance:

For the Church's social doctrine, the economy 'is only one aspect and one dimension of the whole of human activity. If economic life is absolutized, if the production and consumption of goods become the centre of social life and society's only value, not subject to any other value, the reason is to be found not so much in the economic system itself as in the fact that the entire socio-cultural system, by ignoring the ethical and religious dimension, has been weakened, and ends up limiting itself to the production of goods and services alone' (Centesimus, 39). The life of man, just like the social life of the community, must not be reduced to its materialistic dimension, even if material goods are extremely necessary both for mere survival and for improving the quality of life. [...] Thus a great deal of educational and cultural work is urgently needed, including the education of consumers in the responsible use of their power of choice, the formation of a strong sense of responsibility among producers and among people in the mass media in particular, as well as the necessary intervention by public authorities' (Centesimus, 36).³⁷

³⁶ For instance: 'In pastoral care, sufficient use must be made not only of theological principles, but also of the findings of the secular sciences, especially of psychology and sociology, so that the faithful may be brought to a more adequate and mature life of faith.' SECOND VATICAN ECUMENICAL COUNCIL, *Gaudium et spes*. 62. AAS 58. 1966.

³⁷ *Compendium*, 375 – 376.

Sometimes, in the opinion of the RCC, we underestimate certain problems, and probably we could also speak of a moral emergency when, too often, we ignore that part of our material richness is possible due to the poverty of other people. Nevertheless, this unbalanced situation is not, according to social thought, a natural and unavoidable consequence of human existence. There is a concrete possibility for making economic choices that would change the course of the history of poverty in the world.

For instance, Roman Catholic social thought proposes to us that our age needs a new compass that can also indicate ways for using properly our ability to create wealth as a presupposition for sharing it. Regarding this, the Roman Catholic Church believes that people can be taught to use their material means and capacities for higher and more important ends, ethical and religious ones in particular, than for profit or instant individual gratification.

Regarding education, some secular thinkers seem to point to the same path. Martha Nussbaum believes that contemporary societies need to re-consider the role of the humanities in the educational process. Once that the utility and necessity of technical studies is acknowledged, it is equally necessary not to forget the role of the human sciences in shaping the ethos of citizens of the world.³⁸

Social teaching seems to accept the possibility of a radical change of social and economic arrangements, but this requires the participation of a variety of socio-economic actors and also presupposes a radical shift in educational and mass media. According to Roman Catholic social doctrine, we cannot charge the responsibility of such a huge change of mentality exclusively to one sphere, whether the public or the private sphere. The point is that each person, considering himself or herself part of the world family, should find himself on his way to sharing. Upon this view, again, each person can play a role in the socio-economic process, both as a consumer with the 'power of choice', and as a producer with 'responsibility', and as a citizen in relation to regulation.

³⁸ See M. C. NUSSBAUM, *Not for profit. Why democracies needs humanities*. Princeton: Princeton University Press, 2010.

Chapter II – Social doctrine and its *Compendium*

1. *Introduction*

After the presentation of the previous chapter, here I will try to delineate more in detail the content of the *Compendium of the social doctrine of the Church* and use this to offer a further analysis of the Roman Catholic Church's social thought. This requires also a short inquiry into certain aspects of Roman Catholic theology and a brief account regarding the historical development of social teaching, which will be given in the next chapter.

I do not intend to treat all topics present in RC social teaching, nor all the topics organized and elaborated in the *Compendium*. For what concerns us, a few specific topics will be enough to be the interpretative basis for the analysis of *Caritas in veritate*. A large part of the *Compendium* is dedicated to social issues such as family, marriage and the role of politics that, albeit somehow linked to diverse economic issues are not representing here our focus.

Therefore, what I try to do is to give an outline of the meanings and purposes of RC social teaching, as well as reasons and advantages in having such social doctrine summarized in a detailed single document, the *Compendium*. In fact, we could also see the *Compendium* as a relevant step in the exposition and schematization process of the entire RC social thought.³⁹ The *Compendium* appears to be an ideal intellectual place in which all social teaching's principles are presented⁴⁰ in detail with constant reference to the original documents of the RCC through explicit and implicit quotations.

The publication of the *Compendium*, by Pontifical Council Justice and Peace, shows the intention of the RCC for having at hand a specific instrument suitable to all people involved in social matters and interested in the Roman Catholic views on these issues. Here are Cardinal Renato Raffaele Martino's words, at that time President of the Pontifical Council, presenting the *Compendium* at a press conference. These may be helpful considerations for clarifying some aspects regarding its scopes and challenges:

This document has been prepared - at the request of the Holy Father [John Paul II], to whom it is dedicated - by the Pontifical Council for Justice and Peace, which is fully responsible for its content. It is now made available to all - Catholics, other Christians, people of good will - who seek sure signs of truth in order to better promote the social good of persons and societies. [...] The most complex problems that had to be dealt with were essentially those determined by: a) the fact that this amounted to compiling a text that had no precedent in the Church's history; b) the attempt to bring into focus certain complex epistemological questions inherent in the nature of the Church's social doctrine; c) the need to give a unified and universal dimension to the document notwithstanding the countless facets and unlimited variety of social realities in

³⁹ See P. CARLOTTI, 'Un chiarimento decisivo'. DSC e teologia morale, in P. CARLOTTI, M. TOSO, eds., *Per un umanesimo degno dell'amore. Il 'Compendio della Dottrina sociale della Chiesa'*. Roma: LAS, 2005. 163 – 167.

⁴⁰ See below, IV.

the world and of the world; and d) the desire to offer a teaching that loses nothing of its lustre over time, in an historical period marked by very rapid and radical social, economic and political changes.⁴¹

Thus, the *Compendium* is intended to be a systematization of the entire RC teaching regarding social topics starting from the Old Testament and Gospel. As far as it is possible to say now, it should be remarked anyhow that officially Roman Catholic social teaching starts in 1891 with pope Leo XIII and his *Rerum novarum*. But, as we have observed, the RCC traces its social teaching back to the Old Testament.

Such a task of systematization could be hard to fulfil, especially for two reasons: firstly, the enormous amount of sources accumulated in more than 2000 years, and secondly, the fact that the RCC has the aim of being globally understood. This latter objective means that in a global world the RCC finds itself forced to operate with the maximum of global intentions. It claims to show its potential in overwhelming those cultural barriers, such as language, that might slow down understanding its message. Thus, the *Compendium* intends to represent the best exemplification of the effort of the RCC to be relevant everywhere in the world.

One of the *Compendium*'s main subjects is the socio-economic condition of humanity in the widest sense. Social and economic facts are usually subject to fast and sometimes unpredictable changes. Due to this it might be reasonable to think that it was a hard undertaking to conceive a work thought to be suitable to be seen as appropriate from many different standpoints, and holding long-lasting relevance. But the final judgement on this, of course, is up to the reader.

The social teaching of the RCC aims to speak to all humanity, independently from particular faiths, languages and customs. The universality of its message is partially due to the fact that it deals with human matters, like for instance the distribution of wealth, widely felt as problems, not only by Roman Catholics. Indeed, a relevant category in social teaching is 'human integral development'. This concept refers to humanity, and not uniquely to Roman Catholics or believers in general. This is because:

*Men and women, in the concrete circumstances of history, represent the heart and soul of Catholic social thought (see JOHN PAUL II, Centesimus annus. 11, AAS 83. 1991. 807).*⁴²

At the centre of the attention in the *Compendium* we should find what is supposed to be at the centre of Roman Catholic social teaching in general, namely the human being. In other words, the *Compendium* declares that the main concern of the social thought is the condition of the human beings in the practical context they are living, apart from individual cultural identities.

We still have to keep in mind that a foundational element throughout RC social teaching, as stressed in several of the quotations proposed, is the light of the Christian faith. This is, according to the traditional Roman Catholic Church's view, an unalterable and consistent tool for interpreting the world, which consequently

⁴¹ PONTIFICAL COUNCIL FOR JUSTICE AND PEACE, *Press conference for the presentation of the Compendium of the social doctrine of the Church*. October 25, 2004.

⁴² PONTIFICAL COUNCIL FOR JUSTICE AND PEACE, *Compendium of the Social Doctrine of the Church*. Città del Vaticano: Libreria Editrice Vaticana, 2004. 107.

grants stability even in interpreting the meaning of social facts. This also means that the Gospel is the basic point of reference for all the interpretative processes. To have the Gospel translated in social terms, the RCC needs to have interpreted Jesus' words. This also tells us that the theological interpretation of the Gospel and of all the Sacred Scriptures falls within the domain of the Roman Catholic hermeneutic tradition. In this sense this social teaching can be called Roman Catholic.

2. Distinctive traits of the Roman Catholic social doctrine

What exactly does it mean to consider social doctrine as *Roman Catholic*? In answering this question we concretely start to analyse social teaching's content, its domain ('social') and its nature ('doctrine').

'Social doctrine' is composed of two words. The 'social' part of it indicates that the Roman Catholic Church wants to deal here not just with specific matters of faith, such as the sacraments or the liturgy, but with issues concerning, for instance, inequalities in the distribution of wealth, labour rights and human dignity. This does not mean that the RCC treats such topics without what it considers the inspiration of the Holy Spirit or without the enlightenment of its faith. It just means that a great part in comprehending and studying such social objects is strictly related to those fields of human knowledge that specifically treat them, as economy, sociology, and humanities in general. Regarding these considerations, and to frame correctly social teaching's domain, it is worthy reflecting from the beginning that

[...] the Church's social doctrine 'belongs to the field, not of *ideology*, but of *theology* and particularly of moral theology' (JOHN PAUL II, *Sollicitudo Rei Socialis*. 41, AAS 80, 1988. 571). It cannot be defined according to socio-economic parameters. It is not an ideological or pragmatic system intended to define and generate economic, political and social relationships, but is a *category unto itself*. It is 'the *accurate formulation* of the results of a careful reflection on the complex realities of human existence, in society and in the international order, in the light of faith and of the Church's tradition. Its main aim is to *interpret* these realities, determining their conformity with or divergence from the lines of the Gospel teaching on man and his vocation, a vocation which is at once earthly and transcendent; its aim is thus to *guide* Christian behaviour' (*Sollicitudo*, 41).⁴³

As we have now seen above, Roman Catholic 'social' doctrine is defined as 'a *category unto itself*'. This is posing a clear separation between scope and methodology, in the development of social doctrine, compared to the development of social sciences and social thought independent of Roman Catholic theology. Social thought comes from a theological ground, namely the interpretation of the Gospel. And clearly this is a different ground from, for example, from that of an economic or social theory. But social thought claims to share with other specific sciences interest in the interaction with the human beings. It would mean that the liaison between social thought, a category unto itself with a theological ground, and other sciences, is humanity.⁴⁴

⁴³ *Compendium*, 72.

⁴⁴ It might be enriching to read a technical definition of social thought: 'Social thought is an inclusive

In the seventies of the previous century, the term ‘social doctrine’ has been accused to be ‘ideological’, in the sense that it was considered as an authoritative imposition from the RCC directed to influence the shape of society. Regarding the rejection of the ideological role assigned to the RC social doctrine there have been different perspectives. For instance, Dominique Chenu, a French Dominican, indeed criticized the vision of the social doctrine as an ideology, in the sense that he saw the risk of a social doctrine that, as an ideology, would aim to shape from above the social life.⁴⁵ Namely, from the ideal of its principles he saw the dangers of a force willing to shape the material reality from a Westernized point of view. It was in fact a time of large debates about the legitimate character of such a doctrine and its role in regards of the socio-economic organization of the secular world.⁴⁶ In this regard Chenu wished to develop a ‘Christian realism’, *réalisme chrétien*, able to read the ‘signs of the times’.⁴⁷

The abandonment by the RCC of the terminology ‘social doctrine’ that was prospected by Chenu has not happened.⁴⁸ The term ‘social doctrine’ has continued to be present in the teaching of the RCC, but without that burden of ‘ideological’ imposition. This terminology is the space for a dialogue about the dynamics between social facts and the corpus of evangelical principle that social teaching aims to put forward. Indeed, from John XXIII with *Pacem in terris*, starts a process of opening towards certain moderate form of socialism. This process ends with *Octogesima adveniens* of Paul VI, that makes the possibility of political pluralism real.⁴⁹

It has been also pointed out how the conception of social teaching as belonging to the field of RC moral theology is the source of both particular strengths and weaknesses. From one side, RC theology provides social teaching with rigour in the exposition of the doctrine and a certain guarantee of internal coherence but, on the other side, the theological ground of social teaching determines a tendency towards closure for those instances and claims that may come from outside the moral theological framework as elaborated in the RC perspective.⁵⁰ In this sense, for example, it has been understood the clash, and the misunderstanding, between the official RC social teaching and some aspects of the liberation theology.⁵¹

term that refers to any expression of ideas concerning the conduct of relations among men, particularly ideas concerning the comprehensive system of relations that is society. According to this usage, Catholic social thought includes not only the official teaching of the Church affecting the organization of society but all social ideas that can be attributed to Catholic inspiration, whether these ideas are taught formally or only exemplified in the social institutions and popular traditions of a given period of history. [...] The basic assumption of the Church’s teaching on social question is that man is a social being. By nature he is dependent on others at every stage of life, for existence and for the fulfilment of spiritual, intellectual, emotional, physical and social needs.’ *New Catholic Encyclopedia*, 2nd ed. Detroit: Thomson / Gale 2003.

⁴⁵ See D. DORR, *Option for the poor and for the earth. Catholic social teaching*. Maryknoll, NY: Orbis Books, 2012. 244.

⁴⁶ See M. D. CHENU, *La ‘doctrine sociale’ de l’Église comme idéologie*. Paris: CERF, 1979. 87 – 96.

⁴⁷ See CHENU, *La ‘doctrine sociale’ de l’Église comme idéologie*, 94 – 96.

⁴⁸ See R. EPP, *A propos de la ‘doctrine sociale de l’Église comme idéologie’*, de M. D. Chenu, in *Revue des sciences religieuses*, Strasbourg: 1980. 78 – 88.

⁴⁹ See EPP, *A propos de la ‘doctrine sociale de l’Église comme idéologie’*, in *Revue des sciences religieuses*, 88

⁵⁰ See F. P. MCHUGH, *Catholic social thought: renovating the tradition. A keyguide to resources*. Leuven: Peeters, 2008. 25.

⁵¹ See MCHUGH, *Catholic social thought: renovating the tradition*, 26 – 27.

Though the RCC has emphasizes its theological source, the advocates of ‘social doctrine’ have also declared that these teachings do not have the specific aim of building a particular socio-economic system or pursuing a definite political or economic program. ‘Social doctrine’ aims to leave to political and economic actors and scholars their proper independence, as clarified since the Vatican II.⁵² Indeed, the objective of the social doctrine is to understand the economic and social world and try to evaluate these elements with the interpretation of the Gospel. Nevertheless, it is worthy to stress that the social doctrine of the RCC aims to be open to all other kinds of knowledge coming from the human sciences:

*The Church’s social doctrine avails itself of contributions from all branches of knowledge, whatever their source, and has an important interdisciplinary dimension. [...] The social doctrine makes use of the significant contributions of philosophy as well as the descriptive contributions of the human sciences. [...] The Church recognizes and receives everything that contributes to the understanding of man in the ever broader, more fluid and more complex network of his social relationships. She is aware of the fact that a profound understanding of man does not come from theology alone, without the contributions of many branches of knowledge to which theology itself refers.*⁵³

Here we have the statement that declares that notwithstanding the theological nature of the social doctrine, it is necessary for the RCC to look at the result of what is outside theology.⁵⁴ In this sense the social doctrine of the RCC assumes an inclusive character. In developing its social doctrine, the RCC recognizes the progress and results of other sciences, and tries to enrich its content with those. The basic assumption coming from the *Compendium* is that the contributions included in the social teaching of the RCC might be effective in improving the human condition which is, as we have seen above, what the RCC presents to have as the centre of its social teaching. In other words, if the objective is to improve the human condition, the RCC believes that its social thought can provide a proper and significant contribution to this end together with more secular perspectives.

2.1. Doctrine and dogma in Roman Catholic theology

According the second word in ‘social doctrine’, the Roman Catholic Church’s teaching on social and economic affairs is called a ‘doctrine’.⁵⁵ Doctrine, which in

⁵² According to which: ‘ [...] we [the RCC] cannot but deplore certain habits of mind, which are sometimes found too among Christians, which do not sufficiently attend to the rightful independence of science and which, from the arguments and controversies they spark, lead many minds to conclude that faith and science are mutually opposed.’ SECOND VATICAN ECUMENICAL COUNCIL, *Gaudium et spes*. 36. AAS 58. 1966.

⁵³ *Compendium*, 76 – 78.

⁵⁴ See MCHUGH, *Catholic social thought: renovating the tradition*, 16.

⁵⁵ A brief definition of ‘doctrine’ in Catholic theology: ‘(Veritates catholicae or doctrina catholica). With this term are called, in a rigorous theological sense, all those truths that the Church is presenting in an authentic way, but not infallible. Catholic doctrine includes some theological conclusions, many affirmations from Papal encyclicals, etc. The Church requires, for such presented truths, an internal adherence, but not an absolute and irrevocable faith adherence. Adherence, given by Church authority, can be taken away when one, with considerations overwhelming the present situation until that

the end means teaching, in our context refers to teaching that is suitable to be shaped and developed through the time. It is an always renewed teaching according to the contemporary situations, in which elements of tension are grasped and analysed.

A doctrine is conceptually to be distinguished from that which in RC theology is defined as dogma.⁵⁶ Doctrine and dogma both teach something. But in the theology of the Roman Catholic Church, dogma indicates a taught truth not open to modification. Dogma goes untouched through the ages. It is a principle from which certain consequences arise on the level of belief as well as in everyday activity for the believer. Only from dogma itself, in a descending line, is it allowed to speculate on its consequences or deeper meaning. Never is a modification of its content allowed once it has been defined as such by the authority of the RCC. This is due to the fact that a dogma comes, according to the RCC, directly from the revelation of God, and the RCC can only give a written interpretation of it but cannot modify its content.

In contrast to dogma, doctrine, about social and economic topics in this case, allows for more extensive speculation, which may involve also the meaning and content of related principles.

moment, has acquired a sure conviction that an opinion, proposed by the Church in an authentic but not infallible way, does not correspond to reality anymore.’ K. RAHNER, H. VORGRIMLER, *Kleines Theologisches Wörterbuch*. Freiburg: Verlag Herder, 1968. 211 [my translation from the Italian edition] Another definition: ‘The word doctrine comes from the Latin *doctrina*, the Vulgate translation for *διδασκαλία* and *διδασχῆ*. It means teaching or instruction and is closely associated with the words catechesis and kerygma. It is used both in the active sense of the imparting of knowledge and in the passive sense of what is taught.’ *New Catholic Encyclopedia*, 2nd ed. Detroit: Thomson / Gale 2003.

⁵⁶ A brief definition of ‘dogma’ in Catholic theology: ‘[...] In modern usage by Church and theology (that is common and unambiguous only since XVIII century) dogma is a proposition object of *fides divina et catholica*; namely a proposition that Church expressly preaches as revealed by God, through ordinary Magisterium or a definition by Papal or Council. Its negation is heresy.’ RAHNER, VORGRIMLER, *Kleines Theologisches Wörterbuch*. 205 [my translation from It. ed.]. Another definition: ‘The Greek word dogma, also used in English, is found among classic authors. It is derived from the Greek *δοκεῖν* [...]. It can mean (1) a private option: what seems good to the individual; (2) a decree: what seems good to public authority; (3) the teaching of a philosopher, which was considered authoritative by his followers. In the Septuagint and New Testament the word is used of a decree of the state (Dn 2.13; 3.10; Lk 2.1). The ordinances of Moses (Eph. 2.15; Col 2.14) are called dogmas, as also decrees of the Council of Jerusalem (Acts 16.4). However, it is a derivation of the third sense indicated above that finds general acceptance among the Fathers and theologians. [...] Contemporary usage. Today dogma is widely used in a strict sense, for all and only those truths that have been revealed by God and proposed as such by the Church for belief by the faithful, that is, those things that Vatican Council I (H. DENZINGER, *Enchiridion symbolorum*, 3011) maintains have to be believed on divine and Catholic faith. Thus, denial of a dogma is heresy. To be a dogma in this strict technical sense, the truth in question has to be part of the public revelation. (Thus, truths privately revealed are not dogmas). Moreover, it has to be declared by the Church’s authority to be believed as revealed. Since dogma is proposed for men’s belief as revealed, it is the object of divine faith and is to be distinguished from those other truths that the Church proposes but not precisely as revealed.’ *New Catholic Encyclopedia*, 2nd ed. Detroit: Thomson / Gale 2003. Also: ‘Since the eighteenth century, the term dogma has been used for religious truths officially defined by the Church as divinely revealed. [...] Attention needs to be directed to the distinction between dogma and doctrine. Although these terms are often used interchangeably, dogma technically refers to a declarative statement that discloses revealed truth. Doctrine refer to explanations of how such truths may be understood. There may be several acceptable doctrines or explanations of a single dogma. It is on the level of doctrine, not of dogma, that the Church admits pluralism.’ M. GLAZIER, M. K. HELLWIG, eds., *The modern Catholic encyclopedia*. Collegeville, MN: Liturgical Press, 2004.

Moreover, for the individual believer, a doctrine has not to be accepted without any sort of criticism as it should be for a dogma. Dogmas descend from the acceptance of the Roman Catholic faith, and this implies that accepting the Roman Catholic faith also dogmas are accepted. On the contrary, a single doctrine may be questionable at any level of the Roman Catholic hierarchy, included the individual lay believer.

The social teaching of the Roman Catholic Church does not represent a dogma according to the same RCC. Nonetheless, this does not mean that the single believer is exempted from a confrontation with it. Its status as doctrine simply means that adherence to social teaching is not compulsory in all its elements for the recognition, for instance, of the Roman Catholic faith as such. The Roman Catholic faith sees itself as based on dogmas intended as revealed facts not suitable for modification through time, such as the Roman Catholic dogmas of the Immaculate Conception, namely the birth without original sin, of the virgin Mary, or the dogma of the one nature and three persons of the Holy Trinity.

From the definition of doctrine of the Roman Catholic Church emerges another relevant element for our analysis, that is the historical character of doctrine. Social doctrine may also be shaped by the same reality it has to face. We may see this for example in regards to globalization, which is a process involved in almost all contemporary debates concerning economy and development, and thus social thought cannot ignore it.

We have not to forget that the denomination ‘social doctrine’ or ‘social teaching’ or ‘social thought’, used in this work as synonyms, are relatively recent in the RCC. Not even in the writings of the late nineteenth century pope Leo XIII, with whom started officially the social doctrine, we find such terminology. Its formal introduction occurred with Pius XII in 1947.⁵⁷ The *Compendium* individuates that the term ‘social doctrine’ goes back to the teaching of pope Pius XI.⁵⁸ It is customary to distinguish the use of ‘social doctrine’ before or after Vatican II (1962 - 1965). Before the Council the term referred to ‘a corpus of unchanging teaching on social issues’. After the Council, and with John Paul II, ‘social doctrine’ assumes the teaching to be more flexible.⁵⁹

*The Church’s social doctrine was not initially thought of as an organic system but was formed over the course of time, through the numerous interventions of the Magisterium on social issues. The fact that it came about in this manner makes it understandable that certain changes may have taken place with regard to its nature, method and epistemological structure.*⁶⁰

What we have just seen above would mean that in the intention of the RCC, social teaching has been shaped according to the present needs of humanity.

Thus, the material conditions of the world are the main cause for a social doctrine to exist. This has been possible thanks to the Apostles, and then the

⁵⁷ See J-Y. CALVEZ, J. PERRIN, *Église et société économique. L’enseignement social des Papes de Léon XIII à Pie XII (1878 – 1958)*. Paris: Éditions Montaigne, 1959. Vol. I, 18 – 27.

⁵⁸ See *Compendium*, 87.

⁵⁹ See DORR, *Option for the poor and the earth*, 244 – 245.

⁶⁰ *Compendium*, 72.

theologians of the early church,⁶¹ and then all the people, both laic and clerical, who through their studies and deeds have given significant contributions.⁶²

Everything, however, according to the RCC, happens on a single path of doctrinal elaboration. In this sense, to consider social teaching as developing a solid and unique structural line becomes essential to its role and relevance within RC teaching. In the opinion of the RCC the fact that social teaching changes its focus through time does not entirely allow one to deny its inner coherence, or to suggest that there might be diverse and conflicting social doctrines. The point seems to be that through history the RCC faces different circumstances that can also influence the method and the content of the teaching. However, there might be a unitary line of development because social teaching's main light, according to the RCC, comes from the Gospel, and this always remains the same light.

From the *Compendium*'s words we have an exemplification of this:

Guided by the perennial light of the Gospel and ever attentive to evolution of society, the Church's social doctrine is characterized by continuity and renewal (see Sollicitudo, 3; PIUS XII, Address to Participants in a Convention of the Catholic Action movement, 29 April 1945, in Discorsi e Radiomessaggi di Pio XII, vol. VII, 37 - 38; JOHN PAUL II, Address at the international symposium From Rerum Novarum to Laborem Exercens: towards the year 2000, 3 April 1982, in Insegnamenti di Giovanni Paolo II, V, 1, 1982. 1095 - 1096).⁶³

'Continuity' and 'renewal' might give us the possibility to interpret RC social thought in a twofold meaning. The Gospel is a constant source of basic principles and inspiration, but the historical conditions require adaptation in the practical application to the specific context. In the end we can also acknowledge that the social agenda of social teaching is shaped by the world's circumstances. Nonetheless, even though doctrine has a more flexible inner character than dogma, doctrine also aims to be universally valid. That is why the same social doctrine is taught all over the world by the Roman Catholic Church.

Though doctrine is to be taken serious, it remains substantially different from dogma. Because dogma is taken to descend directly from God, it is compulsory in all its codified elements. For being one must accept without hesitations or doubts all dogmas proclaimed and defined by the RCC, according to its official self-understanding. Doctrine, on the contrary, remains provisional, and open to debate. There can be arguments about concrete and local implementation of its principles, without raising any controversy about whether all disputants are still Roman Catholic. In some elements of the doctrine an individual believer may reject a particular social teaching without in consequence being considered outside the RC faith. This allows for specific implementation of the social doctrine in different social contexts. Indeed, the tension between the diversity of the local contexts and a need of universality in the teaching of the RCC can be seen also in sympathetic light, as far as the RCC is able to encourage and let flourish the 'local' social doctrine.

⁶¹ Benedict XVI states that: 'Social doctrine is built on the foundation handed on by the Apostles to the Fathers of the Church, and then received and further explored by the great Christian doctors.' BENEDICT XVI, *Caritas in Veritate*. Città del Vaticano: Libreria Editrice Vaticana. 2009. 12.

⁶² See MCHUGH, *Catholic social thought: renovating the tradition*, 12 – 15.

⁶³ *Compendium*, 85.

2.2. About the interpretative sources of the Roman Catholic social doctrine

Before starting to analyse the content of social thought, it would be proper to say something more about its origin. For doing this, it might be valuable to see where the Roman Catholic Church identifies its sources.

The starting point of the Roman Catholic Church's economic principles is in what we might call the socio-economic legislation of the Bible, this is what RC theology says to us. The laws of ancient Israel are those laws from which the RCC constantly draws sense and meaning for its contemporary social thought. They are in this sense a perennial source that supposedly will never be old-fashioned or out-dated. These laws are those founded in some specific passages from Exodus, Deuteronomy and Leviticus; and always according to such a theological framework they form a substantial socio-economic legislation for the people of the ancient Israel.⁶⁴ In particular, the *Jubilee year* and *Sabbatical year* seem to represent, in the interpretation recapitulated in the *Compendium*, a true legislation of institutionalised redistribution.⁶⁵

These laws usually refer to forgiveness of debts, to manumission of slaves and to the temporary end of private property of the land for a renewed common use. This is how the RCC sees such norms:

*The precepts of the sabbatical and jubilee years constitute a kind of social doctrine in miniature (see JOHN PAUL II, Tertio Millennio Adveniente. 13, AAS 87, 1995. 14). They show how the principles of justice and social solidarity are inspired by the gratuitousness of the salvific event wrought by God [...]. These principles become the focus of the Prophets' preaching, which seeks to internalize them.*⁶⁶

The Roman Catholic Church claims to inherit social teaching from the Old Testament and then, under the Gospel's interpretative light, to translate it in contemporary terms. Practically it is a complex process, but it is presented with the objective of maintaining the main line as expressed above.

The *Compendium* identifies a social teaching *ante litteram* in the prescriptions of the Old Testament. A relevant element seems to be that of the general atmosphere of gratuitousness that should pervade the application of these laws. Social teaching claims indeed that the main inspiration and criterion for the application of these laws comes from the gratuitousness of God's salvific message. More practically, in the interpretation of the Roman Catholic Church, the regulations adopted in the biblical passages quoted above are generally supposed to balance the disparity among people that have been accumulated through time.

⁶⁴ Insights and a general overview about this topic and the presence of socio-economic laws in the Old testament can be found in B. GORDON, *The economic problem in biblical and patristic thought*. Leiden: Brill, 1989. For a classic but still stimulating approach see also R. NORTH, *Sociology of the biblical Jubilee*. Rome: Pontifical Biblical Institute, 1954. A specific and detailed inquiry about the economic institutions of the ancient Israel is in R. DE VAUX, *Les institutions de l'Ancien Testament*. Paris: Éditions du Cerf, 1958 – 1960. III, ch. XI Economie.

⁶⁵ See *Compendium*, 24.

⁶⁶ *Compendium*, 25.

3. The Compendium and its content

The *Compendium* is the RCC's most recent and extensive effort to express with the highest possible degree of schematization all the principles in the social doctrine. Until now it is a unique attempt in the history of the RCC's social doctrine.

The *Compendium* can be a concrete influence and inspiration for the contemporary RC believer or the scholar who deals with practical everyday questions regarding human relations. It represents the main pragmatic reference tool for answers coming from the RCC's official voice, and it might be the main element of comparison with other social thoughts. Here we will introduce two key notions from the *Compendium*, notions on human well-being and its understanding of humans.

3.1. First concept in the Compendium: a new humanism

A first significant concept within the social thought needs now to be introduced. This conception articulates what the RCC's aims for, namely to propose a practicable path towards a 'new humanism':

Humanity is coming to understand ever more clearly that it is linked by one sole destiny that requires joint acceptance of responsibility, a responsibility inspired by an integral and shared humanism. It sees that this mutual destiny is often conditioned and even imposed by technological and economic factors, and it senses the need for a greater moral awareness that will guide its common journey.⁶⁷

For humanity to be 'linked by one sole destiny' implies, according to the above quote, recognizing a social responsibility of which each person is charged just because they are all part of the human family. Understanding humanity as a global family is an idea social thought often expresses, albeit sometimes less explicitly. But it is a characteristic trait that we will find again in the *Compendium* as well as in *Caritas*.

Social teaching recognizes progress in technology and economics interweave human living in this world. Given this condition, it is considered necessary to introduce an ethical framework suitable for such globally interlaced human condition.

In other words, integral and solidary humanism, as intended by the social teaching of the RCC, must be

[...] capable of creating a new social, economic and political order, founded on the dignity and freedom of every human person, to be brought about in peace, justice and solidarity. This humanism can become a reality if individual men and women and their communities are able to cultivate moral and social virtues in themselves and spread them in society. 'Then, under the necessary help of divine grace, there will arise a generation of new men, the moulders of a new humanity' (*Gaudium*, 30).⁶⁸

⁶⁷ *Compendium*, 6.

⁶⁸ *Compendium*, 19.

It seems that this new integral humanism that the *Compendium* is calling for includes many elements usually described as human rights. Dignity and freedom for every human person is an objective that many secular institutions also pursue. Social thought recognizes the relevance of having such human rights reflected on a wider scale in society, that is what is intended with ‘social virtues’. Humanity, in the RCC’s perspective, should build a new economic and social order. The fact that a new one is thought of, may be seen as a practical criticism of the contemporary economic order. This criticism is probably due to the fact, I argue, that the RCC is concerned about the lack of that dignity and freedom for every human being that it aspires to.

Though there is agreement on many facets of ‘human rights’, there is a particular difference with the secular discourse about human rights. The role of men and women is to shape society according to such values and rights, but social teaching calls for ‘the necessary help of divine grace’. This element seems to characterize the social discourse here examined and, as we will see explicitly later for instance from *Caritas*, is pointing to the fact that, in the RCC’s view, God’s help is unavoidable, ‘necessary’.

The call for a new humanism may have been inspired by the philosophy of Jacques Maritain. The *Humanisme intégral*⁶⁹ of the French philosopher is similar to the humanism of the social thought regarding the meaning of ‘humanism’, and not only the words used.

The name of Maritain is not expressively quoted in the *Compendium* or in the documents of Vatican II that refer to the new integral humanism, like *Gaudium*, but there are elements that might support the thesis that the philosophy of Maritain contributed to the development of social doctrine. The first is the evidence that one may find in the texts of Maritain and in those of the Roman Catholic Church at the time of the Vatican II. The reference is to the already quoted *Humanisme intégral* for Maritain, and to the documents of the Vatican II *Gaudium et spes*, *Apostolicam actuositatem* and the declaration *Dignitatis humanae*.⁷⁰ Then, there is also the acknowledged friendship and esteem between the pope of the Vatican II, Paul VI, and Maritain.⁷¹ Paul VI, at the end of Vatican II gave the closing message of the Council fathers directed to the world of the intellectuals to Jacques Maritain, recognizing in this way his influence over the Council.⁷² Also, one may find Maritain quoted in Paul VI’s encyclical *Populorum Progressio* about the new humanism the Roman Catholic Church wishes for our modern time.⁷³

⁶⁹ J. MARITAIN, *Humanisme intégral. Problèmes temporels et spirituels d’une nouvelle chrétienté*. Paris: Aubier, 1947.

⁷⁰ See ATTI DEL SEMINARIO DI STUDIO. SEZIONE ITALIANA ISTITUTO INTERNAZIONALE JACQUES MARITAIN, *Il contributo teologico di Jacques Maritain*. Città del Vaticano: Libreria Editrice Vaticana, 1984. 5 – 9. In this same book one may find a bibliography regarding the works on the theological contribution of Maritain, but for the most part these are only in French and Italian.

⁷¹ See P. CHENAUX, *Paul VI et Maritain. Les rapports du ‘maritainisme’ et du ‘maritanisme’*. Roma: Istituto Paolo VI, 1994; the preface of P. VIOTTO, Prefazione, in M. GROSSO, *Alla ricerca della verità*. Roma: Città Nuova, 2006. 20 – 24.

⁷² See ATTI, *Il contributo teologico di Jacques Maritain*, 7.

⁷³ *Populorum*, 20.

3.2. Transcendence

The *Compendium* does not ignore the topic concerning the transcendent character human beings have according to Roman Catholic theology and to the Roman Catholic definition of the human person.

Generally speaking, the topic of transcendence in the wide context of Roman Catholic theology refers to the overwhelming of the material aspects of life to project the individual towards 'immaterial' aspects of life. Indeed, regarding the social doctrine, we may find the path the Roman Catholic Church proposes for having what it considers the unavoidable assistance from God that human beings need in order to build a new humanity. Transcendence is a concept that needs here to be firstly noticed and then eventually developed later on:

'Man cannot give himself to a purely human plan for reality, to an abstract ideal or to a false utopia. As a person, he can give himself to another person or to other persons, and ultimately to God, who is the author of his being and who alone can fully accept his gift' (*Centesimus*, 41). For this reason, 'a man is alienated if he refuses to transcend himself and to live the experience of self-giving and of the formation of an authentic human community oriented towards his final destiny, which is God. A society is alienated if its forms of social organization, production and consumption make it more difficult to offer this gift of self and to establish this solidarity between people' (*Centesimus*, 41).⁷⁴

What appears relevant about transcendence in the Roman Catholic Church's view from the above quote, is that without recognising it, human beings risk to be 'alienated' and, consequently, society as a whole would experience alienation.

We have in the same quote also a definition of what such alienation would mean. Alienation is defined in relation to the idea that human beings should understand their inner nature as made for each other, and ultimately made for God. The Roman Catholic Church appears convinced that without this assumption at the basis it would be impossible to build a fraternal society. In other words, without perceiving human beings as able to transcend themselves, and seeing themselves as part of a wider frame of reference than the material alone, there is little space left for a view of a new humanistic attitude.

The relevance of transcendence as a topic within social discourse will be clearer when we face the content of *Caritas*, and it will be a key issue for analysing the relationships between religion and economy as explained by the Benedict XVI. Within the context of *Caritas*, it should be possible to better see what social teaching points out, namely, that without a transcending intention, economic acts would be tied to the ground. Without the orientation on transcendence, such deeds would only consider their material level as absolutely relevant, thus losing sight of the true meaning of economic action according to the Roman Catholic Church's perspective. In the sense proposed by social thought the true meaning of the economic actions is, instead, exactly in perceiving economic action not as an end in itself, but as an action with a scope that transcends the economic sphere.

The *Compendium* does not address the question of transcendence in economic actions so specifically as it is done in *Caritas*. The *Compendium* stresses a

⁷⁴ *Compendium*, 47.

general openness towards ‘others’, the rest of humanity, and in this we may eventually find a partial result related with what signifies to give a transcendental meaning in living our life, namely to transcend one’s own self. More specifically, according to this orientation, transcendence would allow us to trespass our human nature as we usually immediately perceive it. The possibility for doing it, which represents then a tie with economic subjects, is for the most part in the detachment from selfish and extreme materialistic views of life.

Such views, in social thought’s idea, are found today in a society too often oriented in consumerist paths as the only practicable paths:

The phenomenon of consumerism maintains a persistent orientation towards ‘having’ rather than ‘being’. This confuses the ‘criteria for correctly distinguishing new and higher forms of satisfying human needs from artificial new needs which hinder the formation of a mature personality’ (*Centesimus*, 36). To counteract this phenomenon it is necessary to create ‘lifestyles in which the quest for truth, beauty, goodness and communion with others for the sake of common growth are the factors which determine consumer choices, savings and investments’ (*Centesimus*, 36).⁷⁵

In this opposition of having and being that the *Compendium* poses as fundamental in the debate on contemporary societies, it refers to the encyclical *Centesimus annus*, in which John Paul II tried to warn his listeners about a consumerist attitude able to shape for us new artificial, and if I may add, superfluous needs.

I argue that following the suggestions that the Roman Catholic Church made officially since the Vatican II with *Gaudium*, about the possible contributions, for instance, of psychology and sociology,⁷⁶ it is possible to see a parallel with some classic standpoints. These views about ‘having rather than being’ and society that is ‘alienated’ are also present in some secular interpretations. And in their conclusions these appear to criticize the same consumerist attitude which is the object of criticism in Roman Catholic social doctrine.

Among many authors, I refer to the theories about consumption and alienation of authors like Fromm and some developments of the theories of Marx about alienation.⁷⁷ For these latter indeed is not new the possibility of dialogue between moderate forms of Marxism and the social teaching of the Roman Catholic Church.⁷⁸

According to social thought’s view on consumerism, a consumerist mentality clashes with lifestyles that would be more spiritually oriented without its pressure. In other words, consumerism appears to be a force pushing human beings far from

⁷⁵ *Compendium*, 360.

⁷⁶ See above, I, 6., the quote from *Gaudium*, 62.

⁷⁷ See E. FROMM, *To have or to be?* New York: Harper & Row, 1976; *The sane society*. London: Routledge & Keegan Paul, 1956. And Marx in social sciences, see K. MARX, *Economic and philosophic manuscripts of 1844*. New York: International Publishers, 1964; I. MÉSZÁROS, *Marx’s theory of alienation*. London: Merlin Press, 1970; P. C. ROBERTS, M. A. STEPHENSON, *Marx’s theory of exchange, alienation and crisis*. Stanford: Hoover Institution Press, 1973.

⁷⁸ See DORR, *Option for the poor and the earth*, 3, 281; see also G. SANS, Che cosa rimane di Marx dopo la caduta del muro di Berlino, in *La Civiltà Cattolica*, IV, 3824, 2009, 127 – 136. The author is professor of history of contemporary philosophy at the Pontificia Università Gregoriana, and a shorter version of this article has been also published in *L’Osservatore Romano*, October 21, 2009.

reaching their mature personality, and the alternative is to propose different lifestyles able to set objectives that are more spiritually oriented.

In the end, according to the *Compendium*, our perception of the transcendental meaning in our living together as the human family is obfuscated by a mentality that sees for the human being only material satisfaction. In this consumerist context, the RCC tries to propose an alternative view, of which some principles are represented in its social teaching.

Chapter III – Historical notes on the Roman Catholic Church’s social teaching from *Rerum novarum* onwards

1. *From Leo XIII to John Paul II. A century in continuity?*

The social teaching of the Roman Catholic Church is doctrine, and as doctrine it has the main characteristic of historicity. Therefore, having an overview, even as concise as this one is, on its historical path might show how social doctrine is historically defined. A historical perspective can give us some confirmation about the evolving character of the social doctrine. And besides, an historical overview can furnish some relevant elements about the continuity in content of the social doctrine and how its motives have been articulated through different periods. In fact, the analysis of different popes in different political and social contexts may help us to define how various evolutions, modifications and adaptations occurred according each time to contemporary needs. Due to the fact that social doctrine is a modern concept, I choose here to give a historical outline of social teaching starting from what is recognized by the RCC as the official starting point, namely the social encyclical *Rerum novarum*, 1891, by pope Leo XIII. In the historical notes on social teaching I will follow the chronological order also used in the *Compendium of the social doctrine of the Church*. And I will add my personal schematization in sections according to social texts published by each pope, and to the texts included in Vatican II.

An overview of the popes’ previous statements might show the historicity of social doctrine, demonstrating that each time social teaching dealt with its contemporary problems and developed new answers. We have just briefly seen how social teaching has not sprung from anybody’s personal initiative, but it has been defined in recent times as such when it was already in full existence. Therefore, some kind of social thought should be considered to have always been there, since some Jewish laws in the Old Testament touch on this. Its definition, which includes the *Compendium* as the monumental attempt at systematization is nevertheless an *a posteriori* conception.⁷⁹

Another relevant twofold element that should emerge in this short historical analysis is: from one side, the continuous adherence to the Gospel that RCC claims and, from the other side, the ongoing process of development, adaptation and renewal that strongly characterizes social teaching in its doctrinal shape. Even if the RCC’s social teaching appears to be rooted in the Gospel, from which it takes its basic pillars, it is true that a formal social teaching is different from an informal one. Indeed, the formalization of a ‘social doctrine’ which appears in *Rerum novarum* in 1891, could be considered a sort of answer to the social world of that time. Before such processes of standardization and classification, for which the social topics are the explicit objectives of pope’s letters, social issues were treated among other issues through the entire pastoral teaching of each pope.

In addressing the ‘social question’ the RCC needed to shape a new way of teaching, able to deal with specific and particular social problems of the time. This is the social teaching that started with *Rerum*. It has been said, indeed, that:

⁷⁹ See above II. 2.1.

The reference to the ‘social question’, which is implicitly or explicitly addressed in each definition of the ‘social doctrine’ of the Church, implies the advantage of showing that the teaching presented by the Church in this category is not a theoretical synthesis, but it is the historic answer to a historic problem.⁸⁰

The modernization process, especially in the period between the second half of the nineteenth century and the beginning of the twentieth century brought a decisive character of specialization for almost each field of human knowledge. Sciences started to be more and more strictly separated and specialized according both to traditional paths and to new discoveries.

Together with this attitude, there was generally a new interest for social facts fed not only from the specialization process in science, but also from a modification of society itself. Moreover, the years of the Industrial Revolution and the birth of the modern state, are also the years of the birth of new sciences like sociology. The Council for Justice and peace articulates the point in this way:

*In the nineteenth century, events of an economic nature produced a dramatic social, political and cultural impact. Events connected with the Industrial Revolution profoundly changed centuries-old societal structures, raising serious problems of justice and posing the first great social question - the labour question - prompted by the conflict between capital and labour. In this context, the Church felt the need to become involved and intervene in a new way: the *res novae* (‘new things’) brought about by these events represented a challenge to her teaching and motivated her special pastoral concern for masses of people. A new discernment of the situation was needed, a discernment capable of finding appropriate solutions to unfamiliar and unexplored problems.⁸¹*

These are the pre-conditions in which social doctrine starts to flourish as a separate branch of teaching within the whole Roman Catholic Church’s magisterium (teaching office).

Thus, albeit the ‘social’ issue always existed in the secular world and always had been addressed by the Roman Catholic Church’s organs, only under certain external conditions the Roman Catholic Church adopted a social teaching as such. The *Compendium* sees that a ‘new discernment’ was necessary, implying a sort of revision of the teaching that had been present until the Industrial Revolution. industrialisation was a key historic fact that evoked to the first social encyclical, *Rerum novarum*.

In the following sections, I will give a schematic analysis of the popes and their most significant texts with social relevance starting with Leo XIII.

⁸⁰ J-Y. CALVEZ, J. PERRIN, *Église et société économique. L’enseignement social des Papes de Léon XIII à Pie XII (1878 – 1958)*. Paris: Éditions Moutaigne, 1959. Vol. I, 22. [my translation from the French: ‘La référence à la ‘question sociale’ qui est implicitement ou explicitement contenue dans toute définition de la ‘doctrine sociale’ de l’Église, comporte encore l’avantage d’indiquer d’emblée que l’enseignement présenté par l’Église sous cette rubrique n’est pas une synthèse théorique, indépendante des conditions de son apparition, mais la réponse historique à un problème historique.’]

⁸¹ PONTIFICAL COUNCIL FOR JUSTICE AND PEACE, *Compendium of the Social Doctrine of the Church*. Città del Vaticano: Libreria Editrice Vaticana, 2004. 88.

2. *Leo XIII, 1878 – 1903*

Leo XIII's encyclical *Rerum novarum*, 1891, is usually considered in the RC environment the most important and representative document of Leo XIII's papacy.⁸² In the context of RC social thought it is recognized as the *magna charta* of Christian social activity, as the following pope, Pius XI, defined it.⁸³ Some basic ideas in *Rerum*, such as the right to private property and the freedom of associations for workers, remain assumptions of today's social thought.

Not only was the Encyclical published in 1891 a fundamental step in defining the position of the RCC about specific social issues. It also had a huge impact on subsequent social teaching, literally becoming its cornerstone. It is noticeable that *Rerum* is so relevant in the history of the social teaching of the RCC that it has been celebrated by the following popes four times with official documents. In 1931, Pius XI's *Quadragesimo anno* for the fortieth anniversary; in 1961, John XXIII's *Mater et magistra* for the seventieth anniversary; in 1971, Paul VI's *Octogesima adveniens* for the eighty years; in 1991, John Paul II's and *Centesimus annus* for celebrating one-hundred years. Thus, while dealing with the happenings of its epoch, *Rerum* acquired a primary position in the evolutionary process of the social doctrine.

Among all the facts of a century busy with revolutions and structural modifications like the nineteenth century the Industrial Revolution can be considered a revolution that truly changed the course of human history like few other facts in history.⁸⁴

We have said how the term and definition of social doctrine are modern, while social doctrine itself, in its basic traits, is not. Something different starts with *Rerum*. The entire title of the encyclical is: *Rerum novarum. Encyclical of pope Leo XIII on capital and labour*. These 'new things', regarding the social, political and economic world of that time, became for the first time the central theme of an encyclical letter. In this sense, the social topics started to be 'institutionalized'. Namely, social topics gained a proper, official and significant space within the RCC's magisterium.

It is probably not a coincidence, then, that designating that doctrinal corpus under the 'social' category was something that arose when the Industrial Revolution was showing all its potential, and thereby society started to be modified in some of its structural pillars.

During the Industrial Revolution, there was such a modification in the socio-economical settings that it was almost impossible for the RCC to avoid an official clarification from a RC standpoint about issues like labour rights, the responsibility of entrepreneurs and the state's accountability on public welfare. At the same time, the RCC was feeling the responsibility to give answers to major political-economical doctrines and their social ramifications. It is true that the modern state was defining the detachment of the RCC from the temporal power, thus giving less weight to the religious words in the public sphere. Nonetheless, it is hard to imagine that the RCC would not have expressed an official and unambiguous position regarding topics like

⁸² G. ANTONAZZI, D. TARDINI, *L'enciclica Rerum novarum. Testo autentico e redazioni preparatorie dai documenti originali*. Roma: Edizioni di Storia e Letteratura, 1957. 3.

⁸³ See PIUS XI, *Quadragesimo anno*. Città del Vaticano 1931. 39.

⁸⁴ See C. M. CIPOLLA, *La Rivoluzione industriale*, in L. FIRPO, ed., *Storia delle idee politiche, economiche e sociali. Vol. V, L'Età della Rivoluzione industriale*. Torino: Utet, 1972. 11 – 26.

socialism and liberalism. In fact, at that time the ideologies were proposing radical shifts in the ways society should have been interpreted and shaped.

Apart from contingent political issues, it was starting the configuration around the dialectic between owners of factories and workers. More specifically, there was the priority to claim an essential role in human life for private property, and indeed *Rerum* states that it is a 'natural right' for every human being.⁸⁵ This is in evident opposition with those socialist doctrines that were pursuing the suppression of private property for reaching the material equality among the human beings.

These were the years of the rise of a self-awareness that brought the formation of trade unions and their active participation to political life. Regarding trade unions, in *Rerum* Leo XIII takes a definite position regarding the possibility for the workers to get together for defending their rights. As such, a statement in a papal encyclical might be considered an answer to what was happening in the world of labour. The right for the workers to gather in association with the scope of protect their rights is defined as a natural right.⁸⁶ Thus, to prohibit the association of citizens is to deny a natural right to the members of the society. In general, Leo XIII considered private associations as good means of expression, as far as they do not contrast with the Christian teaching of the RCC. For instance, they should not support anti-religious ideas. Moreover, where it is possible, the doctrine of Leo XIII encourages the formation of trade unions openly related to the RCC and inspired by the teaching of the RCC. And where it is not possible for the believer to join Catholic labour union, there is no doctrinal prohibition for entering a neutral association.⁸⁷

For its part, the RCC did not do something so much new when it was affirming certain principles. What was new was represented by the context in which they had to be affirmed:

This concern of the Catholic Church with the conditions of labor was nothing new and only adapted an old tradition to the problems of the epoch. But something that was new developed toward the end of the [nineteenth] century, namely, a definite scheme of social organization that, making use of the existing elements of groupwise co-operation, visualized a society - and a state - operating by means of self-governing vocational associations within a framework of ethical precepts.⁸⁸

It becomes relevant to notice that this old interest needs to be updated in a particular period of history. The modern organization of society forced the RCC to answer differently from before. This process of adaptation found its formalization with *Rerum*. The Encyclical is the result of a ferment that in more or less a century influenced the RCC⁸⁹. Then, the originality of the social doctrine contained in *Rerum*

⁸⁵ '[For,] every man has by nature the right to possess property as his own.' LEO XIII, *Rerum novarum*, 1892. 6.

⁸⁶ *Rerum*, 51.

⁸⁷ See G. JARLOT, *Doctrine pontificale et histoire. L'enseignement social de Léon XIII, Pie X et Benoît XV vu dans son ambiance historique (1878 - 1922)*. Roma: Presses de L'Université Grégorienne, 1964. Vol. I, 233; P. J. DALPATHADO, *The doctrine of the church about workmen's non confessional or neutral trade unions*. Colombo: St. Vincent's Press, 1957.

⁸⁸ J. A. SCHUMPETER, *History of economic analysis*. New York: Oxford University Press. 1976. 765.

⁸⁹ See I. GIORDANI, *Le encicliche sociali dei papi. Da Pio IX a Pio XII. (1864 - 1956)*. Roma: Editrice Studium, 1956. xviii.

comes from the attitude with which is proposed, which includes the methodology with which the questions are posed. It is the first time that the social issues are officially treated apart from the whole teaching of the Roman Catholic Church. *Rerum* is, in the end, the first encyclical that addresses urgent issues regarding the economic setting of society, giving to them priority over other pastoral issues.

It was equally urgent to develop new ways of liberation from the enslavement of industrial work for the common labourer. Pope Leo XIII was proposing a way inspired both by the light of the revelation of the Gospel and the natural moral law:

In response to the first great social question, Pope Leo XIII promulgated the first social Encyclical, Rerum novarum (see LEO XIII, Rerum Novarum. Acta Leonis XIII, 11, 1892. 97 – 144). This Encyclical examines the condition of salaried workers, which was particularly distressing for industrial labourers who languished in inhumane misery. The labour question is dealt with according to its true dimensions. It is explored in all its social and political expressions so that a proper evaluation may be made in the light of the doctrinal principles founded on Revelation and on natural law and morality.⁹⁰

The Encyclical interpreted the condition of the industrial labourers as unacceptable and from this developed possible solutions.

What is interesting for us now is that *Rerum* not only started a formal path, but it can be considered a milestone in social thought history. It was a pope speaking at the level of political, economical and social authorities, shaping his language according to contemporary necessities and addressing problems felt by everyone and not only by believers. He was proposing the Gospel as the main reference in a field of experience that at first sight seemed to be extraneous to any religious proposal.

Within the field of Roman Catholic social teaching Leo XIII's Encyclical represented in modern times the cornerstone for each subsequent papal promulgation about social affairs. In other words, every subsequent step in social teaching, especially for what concerns methodology in approaching social questions, owes a debt to Leo XIII's Encyclical:

Rerum novarum dealt with the *labour question* using a methodology that would become 'a lasting paradigm' (*Centesimus*, 5) for successive developments in the Church's social doctrine. The principles affirmed by Pope Leo XIII would be taken up again and studied more deeply in successive social encyclicals. The whole of the Church's social doctrine can be seen as an updating, a deeper analysis and an expansion of the original nucleus of principles presented in *Rerum novarum*.⁹¹

Thus, from the *Compendium* we acknowledge the fact that *Rerum* really is seen as a cornerstone, something that has determined social thought's essential nucleus. With it the Roman Catholic Church officially began its path into public discourse on social issues and affirmed a methodological principle never to be abandoned by social teaching.

⁹⁰ *Compendium*, 89.

⁹¹ *Compendium*, 90.

3. Pius XI, 1922 – 1939

Between Leo XIII and Pius XI there are two popes: Pius X, 1903 – 1914 and Benedict XV, 1914 – 1922. Regarding the economic questions of their times, they both confirmed and brought forward the guidelines given in *Rerum*, but did not add much. In the entire *Compendium* Pius X is not mentioned, and Benedict XV only once.

The concern of Pius X was more on the political level. He had to face the birth of political associations in Europe marked by a Christian identity. His preoccupations were directed towards the pursuit of equilibrium between such seminal political associations of laic people and the RC hierarchy.⁹²

During the papacy of Benedict XV the First World War was the central theme of almost any discourse or declaration. Therefore, the possibility for this pope to give an original contribution to the teaching of the RCC in the socio-economic field was reduced due the problems caused by the disaster of the war.⁹³

We go forward with a brief analysis of pope Pius XI, which is more relevant for our purpose. Just after the Wall Street stock-market crash, Pius XI published the encyclical *Quadragesimo anno*, to commemorate *Rerum novarum*'s fortieth year (1931). The process of industrialisation in the West was still in full swing and in that period, powerful economic groups in many diverse sectors, financial, metallurgic, mining, transport and oil, were gaining more and more power.⁹⁴ Pius XI tried to grasp the dangers and signs of his time by reconsidering the teaching of Leo XIII's Encyclical.⁹⁵ Regarding the relationship between the state and the private sector, he introduced the principle of subsidiarity,⁹⁶ which will become a recurring principle each time the RCC addresses specific subjects regarding public intervention in economic affairs.

The *Compendium* summarizes this stage of social thought in this way:

Quadragesimo anno confirms the principle that salaries should be proportional not only to the needs of the worker but also to those of the worker's family. The State, in its relations with the private sector, should apply the *principle of subsidiarity*, a principle that will become a permanent element of the Church's social doctrine. The Encyclical rejects liberalism, understood as unlimited competition between economic forces, and reconfirms the value of private property, recalling its social function.⁹⁷

According to the *Compendium* the Pope was again addressing the circumstances around him. There were still present the debates about a just salary for workers and their families.⁹⁸ His Encyclical rejects firmly the economic liberalism that was

⁹² See CALVEZ, PERRIN, *Église et société économique*, vol. I, 112 – 113; P. De LAUBIER, *La pensée sociale de l'Église catholique. Un idéal historique de Léon XIII à Jean Paul II*. Fribourg: Éditions Universitaires, 1986. II.I, 2.

⁹³ See De LAUBIER, *La pensée sociale de l'Église catholique*, II.I, 3; CALVEZ, PERRIN, *Église et société économique*, vol. I, 114.

⁹⁴ See JARLOT, *Doctrines pontificales et histoire*, vol. II, 247.

⁹⁵ See JARLOT, *Doctrines pontificales et histoire*, vol. II, 261.

⁹⁶ See JARLOT, *Doctrines pontificales et histoire*, vol. II, 266.

⁹⁷ *Compendium*, 91.

⁹⁸ See JARLOT, *Doctrines pontificales et histoire*, vol. II, 272.

widely spreading at the time under the protection of political liberalism. Economic liberalism is rejected when it means in practical terms an unconditioned and unregulated competition between forces in the market environment.⁹⁹ More than this, Dorr has pointed out how through the criticism expressed towards liberalism a rejection of an unregulated and unrestrained capitalism is made.¹⁰⁰ Anyhow, also Dorr recognizes a particular ambivalence of Pius XI in his treating of capitalism¹⁰¹ that is due to the general incompetence that Pius XI saw for the RCC in giving technical detail about the specific economic setting that has to be adopted.¹⁰²

Parallel to the clear rejection of some liberal economic settings, there is the idea of the state acting as a *subsidiium* for the private economic actor. With this conception the Pope introduced in the social thought the formal idea of the subsidiarity principle.¹⁰³ In this, Pius XI was bringing forth the ideal of cooperation among classes and institutions that had been proposed by Leo XIII.¹⁰⁴ It might be the perfect balance; from one side the state is called to regulate the market from a liberalism without barriers, and from the other, its perimeter line is drawn where the private citizen can still operate alone. I will treat the principle of subsidiarity more in detail later on in the next chapter, when we will face the principles of social thought.

4. Pius XII, 1939 – 1958

Pius XII did not publish any specific social encyclical, but he was active and interested in social topics, expressing his view and proposing the Roman Catholic Church's perspective through different means, other than that of the encyclical letter, like *Radiomessaggi natalizi* (Christmas radio messages). His teaching had to face unusual events, like the Second World War and also the following period of reconstruction. He feared both towards the Nazi threat as well as the communist dangers.¹⁰⁵ In facing these, Pius XII emphasized the solid democratic foundation of the Western countries. In his interventions he called for a general attitude of preserving personal freedoms.¹⁰⁶

It was not only a reconstruction of buildings and cities, fundamental of course, but also a reconstruction of human ethics, laws and a general moral order after what was probably the most imposing war in human history. His words were directed to console and support the afflicted souls of people. In this atmosphere, characterized by material and spiritual reconstruction, together with an understandable generalized discouragement, Pius XII in his social statements insisted

⁹⁹ See PIUS XI, *Quadragesimo anno*. 106 – 108. AAS 23. 1931; De LAUBIER, *La pensée sociale de l'Église catholique*, II, 7.

¹⁰⁰ See D. DORR, *Option for the poor and for the earth*. Catholic social teaching. Maryknoll, NY: Orbis Books, 2012. 55 – 56.

¹⁰¹ See DORR, *Option for the poor and for the earth*, 56 – 58.

¹⁰² See *Quadragesimo*, 41; DORR, *Option for the poor and for the earth*, 57.

¹⁰³ See DORR, *Option for the poor and for the earth*, 54.

¹⁰⁴ See J. SCHASCHING, *Quadragesimo anno: continuità e aggiornamento*, in ACTES DU COLLOQUE ORGANISÉ PAR L'ÉCOLE FRANÇAISE DE ROME, *Achille Ratti Pape Pie XI*. Rome: École française de Rome, 1996. 401

¹⁰⁵ See DORR, *Option for the poor and for the earth*, 69.

¹⁰⁶ See DORR, *Option for the poor and for the earth*, 75 – 76.

on the relationship between morals and law, and on the role of all entrepreneurs to contribute to the common good.¹⁰⁷

One of the characteristics of Pope Pius XII's interventions is the importance he gave to the relationship between morality and law. He insisted on the notion of natural law as the soul of the system to be established on both the national and the international levels. Another important aspect of Pope Pius XII's teaching was his attention to the professional and business classes, called to work together in a special way for the attainment of the common good. 'Due to his sensitivity and intelligence in grasping the 'signs of the times', Pope Pius XII can be considered the immediate precursor of Vatican Council II and of the social teaching of the Popes who followed him' (Guidelines, 22).¹⁰⁸

Pius XII gave new significance to the debate about natural law¹⁰⁹ that so much had occupied philosophical debates in the previous four centuries, from Grotius and Pufendorf to Leibniz, Rousseau and Kant, just to name some major thinkers. The Pope wished to see the results of this debate flourish both at national and international juridical levels. In this respect he is considered as a forerunner of Vatican II (1962 – 1965), which still strongly pervades today's social teaching. It has been noticed that, notwithstanding the absence of proper social encyclicals, he is the most quoted pope among all predecessors in the documents of Vatican II.¹¹⁰ Indeed, his attitude made him foresee some issues that are still significant today and that had become a relevant concrete influence also in a preparatory phase of Vatican II. These key elements are essentially represented by the interest towards the business class, and their possible contribution to the realization of the common good through the cooperation of diverse subjects, the attention for international relations, and the re-definition of the limits of private property. Regarding the topic of international relations his concern was mainly provoked by the cold war between the Cold War between the East and the West. This made him foresee how such a generalized social climate of suspicion could allow improper intrusions in the citizen's private life.¹¹¹

Regarding private property he declared that the use of private possessions should be done with the aim of sharing them. Thus he subordinated private property to what later will be defined as the principle of the universal destination of goods. Dorr underlines how such a reflection on the role of private property was a corrective to what had been preached by Leo XIII in *Rerum*.¹¹² That the 'general destination' of material goods was to be placed above private use, had remained unclear in Leo XIII statements. Leo XIII acknowledged the necessary role of the private material goods at the service of the general well-being of all the other people. But Pius XII stated more clearly by principle a hierarchical difference between private property and universal destination.

¹⁰⁷ See De LAUBIER, *La pensée sociale de l'Eglise catholique*, II, 8, 11.

¹⁰⁸ *Compendium*, 93.

¹⁰⁹ CALVEZ, PERRIN, *Église et société économique*, vol. I, 65.

¹¹⁰ See De LAUBIER, *La pensée sociale de l'Eglise catholique*, II, 13.

¹¹¹ See DORR, *Option for the poor and for the earth*, 76.

¹¹² See DORR, *Option for the poor and for the earth*, 78.

5. John XXIII, 1958 – 1963

In the time of John XXIII there is, on the one side, the experience of new social freedoms, economic development that allows better prospects for the future, and there are also good signs in the delicate relationships between East and West. On the other side, the world starts to be conscious about misery, especially, the miserable condition that people in the so-called Third World countries experience. Their lack of development makes some, in South and North, call upon the richest nations for help. Moreover, when it seems that strictly Western questions such as labour rights and industrialisation have finally received a substantial answer, it is the time when issues like sustainable environmental policies, agriculture in developing countries and global economic co-operation arise.

With the teaching of John XXIII in his social encyclicals *Mater et magistra* and *Pacem in terris*, the RCC addresses the objective of global peace and world collaboration; peace and development regard a common path to be walked together.

John XXIII was the first in the history of the RCC to address an official document to all people of good will. This thing remains until now a specificity of social encyclicals, which we find also in *Caritas in veritate*.¹¹³ John XXIII wanted to show in this way the wish, and the will, of putting down all the implicit barriers for a real common good. He wanted to put some foundational trajectories for building a human community, a community of persons:

Blessed Pope John XXIII, in his Encyclical *Mater et magistra* (see JOHN XXIII, *Mater et Magistra*. AAS 53, 1961. 401 - 464), 'aims at up-dating the already known documents, and at taking a further step forward in the process of involving the whole Christian community' (*Guidelines*, 23). The key words in the Encyclical are *community* and *socialization* (*Mater*, 53) [...]. In this way economic growth will not be limited to satisfying men's needs, but it will also promote their dignity. With the Encyclical *Pacem in terris* (JOHN XXIII, *Pacem in Terris*. AAS 55, 1963. 257 - 304) Blessed Pope John XXIII brings to the forefront the problem of peace in an era marked by nuclear proliferation. Moreover, *Pacem in terris* contains one of the first in-depth reflections on rights on the part of the Church; it is the Encyclical of peace and human dignity. [...] It is the first time that a Church document is addressed also to 'all men of good will' (*Pacem*, AAS 55, 257), who are called to a great task: 'to establish with truth, justice, love and freedom new methods of relationships in human society' (*Pacem*, AAS 55, 301). *Pacem in terris* dwells on the public authority of the world community, called to 'tackle and solve problems of an economic, social, political or cultural character which are posed by the universal common good' (*Pacem*, AAS 55, 294).¹¹⁴

John XXIII's social encyclicals refer strongly and directly to the writings of his predecessors. We may say, looking at his texts, that his principal and fundamental consideration on social issues stemmed directly from the words of Leo XIII and Pius XI. Nevertheless, he has introduced within social teaching two elements I believe should be noticed. The first, as just said above, is the direct address of his social

¹¹³ See D. MELÉ, M. NAUGHTON, The encyclical-letter *Caritas in veritate*: ethical challenges for business, in *Journal of Business Ethics*, 100. 2007. 1.

¹¹⁴ *Compendium*, 94 – 95.

teaching, in the encyclical *Pacem in terris*, to all people of good will. This has remained a constant element in all the subsequent encyclicals on social issues. The implicit consequence is that the RCC officially proposes its social teaching as relevant to all people. The minimum element to be shared for participating in the realization of the common good would be not belonging to the RCC, but being a person with good will. A second element in the *Pacem in terris*, in continuity with the previous *Mater et magistra*, is probably that John XXIII for the first time outlined as a desirable objective for the future development of international relations a world order authority. Such an institution should be able to bring order in the ‘disordered’ world affairs.¹¹⁵ It is about a common good seen with a universalistic outlook, namely a worldly common good for all the nations.¹¹⁶ John XXIII clearly moved ‘the topic of international development cooperation towards the centre of the social justice agenda’.¹¹⁷ This is also significant for us especially because the idea of a global authority has been re-proposed recently in two official documents. One is *Caritas*,¹¹⁸ and the other is a note from the Pontifical Council Justice and Peace concerning the recommended establishing of an independent world institution able to reform and re-direct the monetary and financial system.¹¹⁹

It has been said that because of the content and of the style, the social teaching of John XXIII represented a sort of ‘opening to the left’ (*apertura a sinistra*), or better a moving ‘away from the right in regard of economic affairs’.¹²⁰ This opinion can be shared as far as it does not exaggerate in seeing in this ‘opening’ the Pope advocating socialism.¹²¹ Nevertheless, authors like Dorr recognize in the social teaching of John XIII, especially in *Mater*, the stimulus and confirmation for the Latin American church leaders for fact that the RCC had to choose, and was choosing, to support the cause of the poor.¹²²

6. The Second Vatican Council, 1962 – 1965

It should be noticed for our scopes that the Second Vatican Council (Vatican II) represents the main answer coming from the RCC to the contemporary world social questions. Vatican II traces the way for the future RCC, in the sense that it shaped the Roman Catholic Church that we should see today. Vatican II is an ecumenical council called for by John XXIII in 1962 and ended in 1965, after John XXIII’s death, with Paul VI conducting the conciliar works to the end. This was the first time a Roman Catholic Church’s assembly was planetary.¹²³ The council had the main

¹¹⁵ See JOHN PAUL II, *Message for the celebration of the 34th World Day of Peace 2003*. 6.

¹¹⁶ See De LAUBIER, *La pensée sociale de l’Eglise catholique*, III, 2.

¹¹⁷ DORR, *Option for the poor and for the earth*, 104.

¹¹⁸ See BENEDICT XVI, *Caritas in Veritate*. Città del Vaticano: Libreria Editrice Vaticana. 2009. 67, and below VII, 3.2.

¹¹⁹ See PONTIFICAL COUNCIL FOR JUSTICE AND PEACE, *Towards reforming the international financial and monetary systems in the context of global public authority*. Vatican City: 2011.

¹²⁰ DORR, *Option for the poor and for the earth*, 443; similarly 118.

¹²¹ See DORR, *Option for the poor and for the earth*, 119.

¹²² See DORR, *Option for the poor and for the earth*, 120 – 121.

¹²³ See K. RAHNER, *Theologische Grundinterpretation des II. Vatikanischen Konzils*, in *Schriften zur Theologie*, XI. Einsiedeln: Benzinger, 1980. 290 – 299.

purpose of updating (*aggiornamento*) and renewing the condition of the Roman Catholic Church in the contemporary world,¹²⁴ and not for solving one or more specific dogmatic or doctrinal issues like usually happened. From October 1962 to December 1965 the members of the Council, or ‘Council fathers’, ‘were assisted by several thousand experts in theology, canon law, and Church history. There were also present in an official capacity (though without the right to speak or vote) observers from the main Churches not in communion with the RC Church’.¹²⁵

For what concerns in general the social discourse, Vatican II strongly bets on the dialogue between different people and cultures while relying upon the tradition of the RCC. Addressed in the Council is also the necessity for freedom of religion in contemporary society, assuming that such freedom must be recognized at the institutional level as human right.¹²⁶ Broadly speaking, Vatican II established a communication framework updated to what were the contemporary world’s needs in the eyes of the Council fathers. While, more specifically concerning socio-economic issues, the Council re-proposes the RCC’s view about the relevance of understanding the human being both as a person, thus with a personality to be fulfilled, and as a creature loved by his God. This latter theme, in particular, sets a standpoint that even implicitly is often a theological basis for some elaborations within the social thought:

The Pastoral Constitution *Gaudium et spes* (see SECOND VATICAN ECUMENICAL COUNCIL, *Gaudium et spes*, AAS 58, 1966, 1025 - 1120) of the Second Vatican Council is a significant response of the Church to the expectations of the contemporary world. [...] Everything is considered from the starting point of the person and with a view to the person, ‘the only creature that God willed for its own sake’ (*Gaudium*, 24). Society, its structures and development must be oriented towards ‘the progress of the human person’ (*Gaudium*, 25).¹²⁷

Therefore, the *Compendium*, especially focusing on the Pastoral Constitution *Gaudium et spes*, emphasizes Vatican II’s main contribution to social thought with its attention to the human person as the central element in all social issues.

Gaudium et spes ‘Joy and hope’ is an extensive document, addressing moral and socio-economic issues. Looking at its composition, the topics treated and the way in which they are posed, it seems to be a sort of mini-compendium for social teaching. This is probably one of the results of the Vatican II. The Second Vatican Council was indeed, from the perspective of the Council fathers, a concrete attempt to put the RCC in a better position for its dialogue with the secular world.¹²⁸ This

¹²⁴ G. ALBERIGO, *Transizione epocale. Studi sul Concilio Vaticano II*. Bologna: Società Editrice Il Mulino 2009, 42.

¹²⁵ F. L. CROSS, E. A. LIVINGSTONE, eds., *The Oxford Dictionary of the Christian Church*. New York: Oxford University Press, 1997.

¹²⁶ Here the reference: ‘Another very important document of the Second Vatican Council in the corpus of the Church’s social doctrine is the Declaration *Dignitatis humanae* (see SECOND VATICAN ECUMENICAL COUNCIL, *Dignitatis humane*. AAS 58, 1966, 929 – 946), in which *the right to religious freedom* is clearly proclaimed.’ *Compendium*, 97.

¹²⁷ *Compendium*, 96.

¹²⁸ This was the intention of the Council fathers, see G. TURBANTI, *Un concilio per il mondo moderno. La redazione della costituzione pastorale ‘Gaudium et spes’ del Vaticano II*. Bologna: Il Mulino, 2000, II, 111 – 179.

specific effort of orienting the RCC towards the contemporary world's needs reaches its peak with the topics touched in *Gaudium*.¹²⁹ The third chapter of *Gaudium* is entirely dedicated to economic life. The chapter treats basic themes of the social thought, economic development and its relation to the human person, economic inequalities, the conditions of labour and the participation of workers in the economic activity of the enterprise. Then, we can also find in it the principle of the universal destination of goods.¹³⁰ This is a relevant principle that even if present in the previous social teaching, receives in *Gaudium* a level of specification that clarifies the relation between the universal destination of goods and private property.¹³¹ In this pastoral constitution it is stated that the possession of goods must be propaedeutical to the co-division of the same goods. Such clearness in the hierarchy between private possession and the general destination of goods represented undoubtedly an incisive step forward for the possibility of a concrete application of this principle.¹³² Also in regard to the option for the poor in the social justice agenda, it has been noted how *Gaudium et spes* was the ground on which the Roman Catholic Church in Latin America built its theological foundation in opting for the poor.¹³³

7. Paul VI, 1963 – 1978

Paul VI, in *Populorum progressio*, the encyclical letter *on the development of people*, stated that for having peace, we must implement development. This latter must not be an empty general and abstract word to be filled each time with new social or economic terminology. Development in Paul VI's words, means moving from inhuman conditions towards more human conditions.¹³⁴ What does this mean more exactly? According to the Pope, we do not have to think in technological and economic terms. These are eventually an essential corollary, and to some extent it is obvious that material needs are essential. But, at that basis, the Pope claims that we should strive for a spiritual-founded society, and switch from a society based on having to one based on being.¹³⁵ Thus, in his perspective, human progress is a progress that does not exclusively regard material enrichment. And through these, development goes towards a 'complete humanism' supported by peace and justice:

This *transition* is not limited to merely economic or technological dimensions [...]. Development that benefits everyone responds to the demands of justice on a global scale that guarantees worldwide peace and makes it possible to achieve

¹²⁹ See EPISCOPAT FRANÇAIS / ACTION POPULAIRE, *Constitution pastorale Gaudium et spes*. Paris: Spes, 1966. 9

¹³⁰ See *Gaudium*, 69.

¹³¹ See E. LIO *Morale e beni terreni. La destinazione universale dei beni terreni nella 'Gaudium et spes' e in alcune fonti*. Pontificia Università Lateranense. Roma: Città Nuova, 1976. I, 31 – 75.

¹³² See DORR, *Option for the poor and for the earth*, 136.

¹³³ See DORR, *Option for the poor and for the earth*, 142 . 145.

¹³⁴ See *Populorum*, 76 – 80; S. QUADRI, V. LEVI, V. MORERO, *'Populorum progressio'. Testo, commento e documentazione con indice analitico - ragionato*. Roma: Edizioni Paoline, 1967. 104 – 114.

¹³⁵ See De LAUBIER, *La pensée sociale de l'Église catholique*, III, 5.

a 'complete humanism' (PAUL VI, *Populorum progressio*. 42. AAS 59. 1967. 278) guided by spiritual values.¹³⁶

All these considerations help to define Paul VI's originality in his approach to development.¹³⁷ He did not limit his analysis to the contemporary Western economic situation as a starting point. He furnished the practical references that should guide the evaluation of the type of development that we want and we practice, namely the global scale. We will also see in the chapters dedicated to *Caritas in veritate* how the content, and in some measure also the approach, of *Populorum* is still present in today's social teaching.

It is then in 1967, and from this standpoint exactly, that Paul VI, following a proposal from Vatican II, established the *Iustitia et Pax* Commission,¹³⁸ later made a Council. That is the Pontifical Council for Justice and Peace that has later developed the *Compendium*.

And, from 1968 onwards, on New Year's Day, Paul VI establishes the celebration of the *World Day of Peace*. This sets the tradition in sending messages regarding each year different themes, as a contribution to the enrichment of the social doctrine. In 1971, on the occasion of the eightieth anniversary of *Rerum novarum*, the Pope published the social encyclical *Octogesima adveniens*. This is the occasion for thinking about some major matters the world was facing at the beginning of the seventies in the twentieth century:

The Pope reflects on post-industrial society with all of its complex problems, noting the inadequacy of ideologies in responding to these challenges: urbanization, the condition of young people, the condition of women, unemployment, discrimination, emigration, population growth, the influence of the means of social communications, the ecological problem.¹³⁹

Thus, on the one end, Paul VI can be considered to close a period, that of Vatican II, giving fulfilment to the work started by John XXIII. On the other end, with *Populorum* he ploughed the terrain for social encyclicals that still have to come. Indeed, as we will see later, it is Benedict XVI that declares his continuity in the spirit inaugurated with *Populorum*, and makes of this encyclical one of his major inspirations. This fact can be probably explained by the observation that Paul VI started to treat directly and expressly certain themes that would become the main topics in future debates. Issue like globalization, world migrations, ecology, were all starting to attract people's attention. The material inequalities in different zones of the world is a topic that started to raise the interest of the Western world heavily during the sixties of the twentieth century.

Nowadays such issues have not diminished their weight in public debates and in academic contexts. Instead, they are perhaps among the main topics to be addressed in facing the socio-economic question of contemporary time. It is saddening, as the Benedict XVI will claim in *Caritas*, that these problems, such as the condition of women, lack of religious freedom, and human rights generally

¹³⁶ *Compendium*, 98.

¹³⁷ See DORR, *Option for the poor and for the earth*, 157 – 158.

¹³⁸ See *Gaudium*, 90.

¹³⁹ *Compendium*, 100.

speaking, still need to be at the core of our social analysis. In this direction, namely in interpreting the development of people as the development of their freedoms and rights, goes also the analysis of Amartya Sen. For him, economic development in the globalized context should go parallel with the democratization process.¹⁴⁰

Paul VI is usually considered the pope that opened the social doctrine to the global matters. He enlarged the perspectives of social teaching. Regarding such a tendency to openness, it might be interesting to notice that *Populorum* is probably the only social encyclical to quote extensively and directly other sources than official pontifical documents to give confirmation of the Pope's analysis. Usually popes do not reveal their external bibliographical sources. Our aim of contextualizing the RC social teaching, and individuate eventual links with the secular world it is easier here.

Some sort of data documents, like United Nations papers about welfare or inequalities, can be found indeed also in John Paul II encyclical for instance. But in *Populorum* one may find quoted also the works of Jacques Maritain, Dominique Chenu, Henri De Lubac, Louis-Joseph Lebret, Colin Clark, Oswald von Nell-Breuning. This might be an indirect confirmation of the will of this Pope to remain open to the more or less secular perspective, as articulated by Catholic lay thinkers.

8. John Paul II, 1978 – 2005

John Paul II came after the unexpected death of John Paul I, who in a papacy of 33 days did not leave us any document relevant in our scopes.

John Paul II wrote three social encyclicals; one of those, *Centesimus annus* in 1991, was for the centenary of *Rerum*. Before that, it came the *Laborem exercens* in 1981 that was written in occasion of the ninetieth year since *Rerum*. In this text John Paul II focused on the role that the contemporary societies should give to work. In his view human labour should be seen as the key element in socio-economic life. Following the tradition of the RCC concerning work ethics, John Paul II underlined human work as a primary human activity for the realization of the self.¹⁴¹

With *Sollicitudo rei socialis*, the social encyclical published in 1987 on the twenty-year anniversary of *Populorum*, the Pope drew the main themes of his encyclical directly from Paul VI. In particular, John Paul II reflected again on the economic and social conditions of Third World countries in contrast to the consumer society of the richer West.

Centesimus commemorated one-hundred years from *Rerum*. And in fact, John Paul II took a profound inspiration from the methods of that text in facing social problems. The Pope enlightens here the solidarity principle as fundamental in social cohesion, and shows how the same concept was named differently, but with the same meaning, under different popes. He also focuses on reciprocity, to be understood as the long chain between God and humans, and among humans:

[...] recognizing God in every person and every person in God is the condition of authentic human development. The articulate and in-depth analysis of the 'new things', and particularly of the great breakthrough of 1989 with the

¹⁴⁰ The general theory is in A. K. SEN, *Development as freedom*. Oxford: Oxford University Press, 1999.

¹⁴¹ See *Compendium*, 101.

collapse of the Soviet system, shows appreciation for democracy and the free economy, in the context of an indispensable solidarity.¹⁴²

It is indeed a peculiar element throughout the social teaching that each human being is seen as valuable because God's presence is in all. In this sense any development ignoring such a huge and divine value, intrinsic in each person, is not, according to the Roman Catholic Church's social thought, true development. Such a conception of development, as development for every human person, introduced decisively by Paul VI, re-stated as fundamental in John Paul II social documents, will be re-affirmed by Benedict XVI as a characterizing and basic principle of development and progress as intended in *Caritas*.

9. Concluding comments about the historical notes

In this chapter we have gone through documents with a social relevance before *Caritas*. When we will come to the analysis of Benedict XVI's encyclical it will be possible to refer to specific topics with the awareness that he is not speaking of something unknown or never before debated within the RCC. Social thought continuously inherits conclusions from the past. And some of these perspectives, as well as conclusions, are deeply rooted in determinate historical frameworks.

Showing continuity in the RCC's social teaching is necessary to understand which critical role we assign to *Caritas*. Moreover, the fact that social teaching is a historical teaching means that it faces different challenges in different time periods not without consequences for its content.

Finally, it probably already has become clear that the RCC is not interested in social issues just because of a modern attitude. What the modern attitude does, is to stimulate for the articulation and formalization of the social engagement. Very actual issues like globalization, migration, ecology and sustainable development are in social teaching the topics to be addressed today for the benefit of humanity. In this perspective, the RCC's social teaching is an answer connected to the pastoral position that the RCC assumes in this world.

Today social doctrine is distinguished from other teachings or doctrines on society, though it always aims to maintain a pastoral concern.¹⁴³ This attitude of pastoral care is also one of the clearer elements that emerge from the religious ground on which social teaching has part of its origin.

¹⁴² *Compendium*, 103.

¹⁴³ See *Compendium*, 104.

Chapter IV – Principles of social doctrine

1. Introduction

The *Compendium of the social doctrine of the Church* lists the principles that are at the basis of the Roman Catholic Church's social doctrine. These are: the *personalist principle* or the dignity of the human person, the *common good*, the *subsidiarity principle*, and the *principle of solidarity*. While analysing them, I will also describe other elements or sub-principles, which are sometimes implied in their content.

Analysing such principles has a twofold utility for us. First, we will see later how Benedict XVI in *Caritas in veritate* expresses, and somewhere develops, some ideas presented in the *Compendium*. The principle of subsidiarity is an example in this sense. Thus, we will observe a theoretical continuity of some elements in *Caritas* with those exposed here. Seeing these principles here, and then in *Caritas*, can also help us reflect upon the process of adaptation of these. We observe that the principles have a long lasting character.¹⁴⁴ The principles of social thought all serve the same aim, the same end. This end is represented by human flourishing. The use principles has to do with the combination of 'continuity and renewal' that has been mentioned before.¹⁴⁵ What is supposed to change or, we could say, to be updated is the method, or the mode in which problems are addressed. There is a sort of translation, in the sense of the rendition or conversion, of such principles according to contemporary situations. Without ignoring that new problems may arise, calling thus for new approaches.

Second, in specific cases it is possible to compare the principles of social teaching with some in the secular field. I am thinking, for example, of the subsidiarity principle and its application in European Union policies, about which there will be occasion to speak again when considering the social doctrine's subsidiarity principle in the context of *Caritas*.¹⁴⁶ This sort of convergence, eventually, is a point in favour of shared values regarding contemporary economic problems between secular and religious standpoints that can help in co-operating for finding solutions.

Before analysing the principles of social doctrine in greater depth, there is a necessary premise. In reading these principles, it could happen that we are brought to interpret them independently one from another. This would be in opposition with that which is suggested in social teaching itself. There is supposed to be harmony among the principles, a character of harmony, as they should not be in contrast with each other, and a character of necessity, in the sense that each one needs the other principles to be completely performed.¹⁴⁷ Especially this latter aspect is closely related to the conception of social teaching regarding the individual human being, intended as a person. A 'person', according to social thought, is something different from an anonymous individual, and this difference can be understood only with the

¹⁴⁴ See PONTIFICAL COUNCIL FOR JUSTICE AND PEACE, *Compendium of the Social Doctrine of the Church*. Città del Vaticano: Libreria Editrice Vaticana, 2004. 161.

¹⁴⁵ See above II, 2.1.

¹⁴⁶ See below chapter VIII, 2.

¹⁴⁷ See *Compendium*, 162.

co-operation of all the principles. As it should emerge, these principles have a large amount of interconnections and reciprocal traits.

Each principle is presented with its own specificity, but it is considered truly worthy if applied contextually with the others. For instance, a concrete common good would be realizable only among persons and not among individuals. Only when each one could determine himself as a person, or could find oneself on the way to become a person or, at least, to live in an environment that allows such growth, only at this point can we speak about the society envisaged by the *Compendium*. Things appear to be interlaced: only persons can build a common welfare, because a common welfare is supposed to exist only for them. Only when every body is a person we will have the opportunity to seek concretely the common good, because only persons can realize it.

The deeper meaning of such principles lies in the fact that, according to RC social thought, they represent the basis of social living. These words give connotation to the deeper foundations of society, both in a moral and in an economic sense.¹⁴⁸ Usually, all principles have a normative character, as do these. But in this case RC social thought puts the roots of this normative character in the social foundations of human life. According to the RCC's social thought, these principles are not supposed to be developed above – on top of – social life from an external source. In other terms, social thought claims to extrapolate the principles from social living itself.

Although normative in their character, in the intention of the Roman Catholic Church they should not be seen as impositions from outer sources. They are not supposed to be external elaborations of enlightened minds that are then projected on social life. Quite the opposite. The Roman Catholic Church aims to propose them as an explication of the human social life. And, if our human behaviour contrasts with such principles, social teaching claims, we might experience what we may call social instabilities and incoherencies.

In other words, these principles, as they are intended by social teaching, express at the same time what society is about and, in this way, they also address what should be done to make society really integrally human. Their normative character arises exactly when we want to comprehend them during the analysis of the social life. This happens both in theoretical approaches, and in practical examinations of social relationships. At the end of this brief consideration, the role of these principles as a synthetic program telling us what social behaviour should be, might be recapitulated as follows:

*These are principles of a general and fundamental character, since they concern the reality of society in its entirety: from close and immediate relationships to those mediated by politics, economics and law; from relationships among communities and groups to relations between peoples and nations. Because of their permanence in time and their universality of meaning, the Church presents them as the primary and fundamental parameters of reference for interpreting and evaluating social phenomena, which is the necessary source for working out the criteria for the discernment and orientation of social interactions in every area. [...] The principles of the Church's social doctrine must be appreciated in their unity, interrelatedness and articulation.*¹⁴⁹

¹⁴⁸ See *Compendium*, 163.

¹⁴⁹ *Compendium*, 161 – 162.

One element that can be underlined again is that all the principles of the RCC's social teaching need to be understood in their unity. Their complete expression might be observed only when their application is contemporary, harmonic. It is probably the case that some principles can be regarded as more important than others. Nevertheless the Roman Catholic Church puts forward that they need to be interrelated to show their full potential.

Now, the first principle to be analysed, in order also to appreciate better the subsequent ones, is the *personalist principle* or, to paraphrase, the principle regarding the human person's dignity.

2. The personalist principle. Person and transcendence

The personalist principle is often mentioned in the *Compendium*, and is indeed one of the most relevant principles in social teaching. My intention is to treat the personalist principle's essential elements that are related to people's economic life. Nevertheless, it comes close to our scope of understanding social teaching's principles, also to look at the sources of this principle. The personalist principle has a philosophical foundation that allows us to see it in the context of social doctrine. Thus, even if we cannot treat extensively the philosophical origins of that current of thought called personalism, we need to be aware of its influence in the developing of this part of social teaching.

Maybe the father of the philosophical programme known as *personnalisme* could help us in understand 'who is' a person:

I can look at this body from without, examine its dispositions, its heredity, its form, its maladies; in short, I can treat it as an object of physiological, medical or other knowledge. He exercises functions, and there is a functional order and a functional psychology which I can *apply* to the study of his case, although they are not *he*, the whole man in his total reality. Moreover, and in the same way, he is *a* Frenchman, *a* bourgeois, *a* socialist, *a* catholic etc. But he is not *a* Bernard Chartier, he is Bernard Chartier. The thousands ways in which I can distinguish him, as *an* example of a class may help me to understand him, and above all to make use of him, they show me how practically to behave towards him. But these are merely sections taken, in each case, through one aspect of his existence. A thousand photographs put together will not amount to a man who walks, thinks and wills.¹⁵⁰

It is too easy to identify *personnalisme*, as a philosophical school of thought with personalism as the social and theological principle presented in the social doctrine. Mounier's philosophy, nevertheless, gives insightful paradigms, helpful for a concrete subsequent application of the principle. That is why I have quoted his passage, namely with the aim of presenting the same concept but from a slightly different angle. The fact is that it should not be so surprising to find juxtaposition and inspiration, and not only merely coincidence, between secular thoughts and religious doctrines of the RCC. However, the evaluation of Mounier's thought does not appear a simple task. In it can be found conservative elements as well as progressive tendencies; firm oppositions to certain Marxist perspectives, but also the sharing of

¹⁵⁰ E. MOUNIER, *Personalism*. London: Routledge and Keegan Paul, 1952. viii – ix.

some of its presuppositions. In politics, Mounier was an eminent representative of the French leftists¹⁵¹ interested in Marxist's views about alienation and consumer society, but equally clear in rejecting the revolutionary and materialistic output of specific Marxist positions.¹⁵² Certain connections in the evolution of Mounier's thought are not 'obvious'.¹⁵³ We can argue that as far as Mounier's philosophy was opposed to 'materialism, individualism and the tyranny of liberalism',¹⁵⁴ Mounier became the interpreter of the antagonism of the Roman Catholic Church towards these specific aspects found in modernity and in some modern philosophical thoughts. As far as Mounier opposed Marxist ideas, he became one of the main philosophical alternatives to Marxism in Europe for the Roman Catholic Church. In the United States figures such as Dorothy Day, together with the *Catholic Worker Movement* (1933), show us that personalist and communitarian principles were found in grass-root movements far from conservative political views but also alternative to Marxist doctrines.¹⁵⁵ And still, in Latin America, Mounier's thought has somehow influenced anti-capitalist views within Roman Catholic social teaching when local intellectuals borrowed from him the term 'communitarianism'.¹⁵⁶

This complex and articulated historical and philosophical setting is not less complex than the general relationship between the high hierarchy of the Roman Catholic Church, usually seen an anti-modern force with conservative elements, in front of the leftist, or at least non-conservative, tendencies of many Roman Catholic individuals, as the Italian example of the 1960s can confirm.¹⁵⁷ Then, we cannot ignore how personalism influenced the Roman Catholic intellectual life of the last century through the perspectives of, for instance, Jacques Maritain and Paul Ricoeur,¹⁵⁸ and Karol Wojtyła. This last, before becoming pope as John Paul II, in 1969 published in Polish *Osoba I czyn*, translated, revised and published in English in 1979 as *The acting person*,¹⁵⁹ in which he develops an alternative to the Marxist methodology rooted in personalism and phenomenology.¹⁶⁰ Today, we notice that Mounier's thought has been expressly quoted by bishop Mario Toso, Secretary of

¹⁵¹ See D. WOLF, Emmanuel Mounier: a Catholic of the left, in *The Review of Politics*, 22. 3. 1960.

¹⁵² J. HELLMAN, French 'left-Catholics' and Communism in the Nineteen-thirties, in *Church History*, 45, 4. 1976. 509.

¹⁵³ S. ARMUS, The eternal enemy: Emmanuel Mounier's *Esprit* and French anti-americanism, in *French Historical Studies*, vol. 24, 2. 2001. 272.

¹⁵⁴ ARMUS, The eternal enemy, in *French Historical Studies*, 271.

¹⁵⁵ See M. ZWICK, L. ZWICK, *The Catholic worker movement. Intellectual and spiritual origins*. New York: Paulist Press, 2005. 97 – 115; B. LEAVITT, Peaceprofile: Dorothy Day, in *Peace Review. A journal of social justice*, 9. 3. 1997. 431 – 438; A. BECK, Making the Encyclicals click: Catholic social teaching and radical traditions, in *New Blackfriars*, 93. 1044. 2012. 217 – 219.

¹⁵⁶ P. E. SIGMUND, Latin American Catholicism's opening to the left, in *The Review of Politics*, 35. 1. 1973. 64

¹⁵⁷ See R. DRAKE, Catholics and the Italian revolutionary left of the 1960s, in *The Catholic Historical Review*, 94. 3. 2008.

¹⁵⁸ See E. BERTI, Il concetto di persona nella storia del pensiero filosofico, in E. BERTI, G. COTTIER, G. PIANA, G. SANTINELLO, L. SARTORI, G. TRENTIN, *Persona e personalismo. Aspetti filosofici e teologici*. Padova: Fondazione Lanza / Gregoriana Libreria Editrice, 1992. 43 – 74.

¹⁵⁹ See JOHN PAUL II, The acting person, in A-T. Tymieniecka, *Analecta Husserliana. Yearbook of Phenomenological Research*, X. Dordrecht: D. Reidel Publishing Company, 1979.

¹⁶⁰ See J. ŻYCINSKI, The role of religious and intellectual elements in overcoming Marxism in Poland, in *Studies in Soviet Thought*, 43. 1992. 143 – 144.

Justitia et Pax at the time I am writing.¹⁶¹ Indeed, communitarian and personalist perspectives maintain a relevant place in today's Roman Catholic social teaching,¹⁶² contributing to prospect a social alternative to more Marxist oriented doctrines. We observe this from the *Compendium's* passages about the human person, and from Benedict XVI's emphasis on the individual 'personal' contribution to the common good in *Caritas*.¹⁶³ As well as we still observe a tension between the RC hierarchy and theological movements that openly pursue, and push for, more political involvement of the RC clergy in politics, especially in the Latin American context, as we will later see.¹⁶⁴

We can also notice how, after a period in which most philosophers left aside investigation on 'the person', there is also a renewed interest in it in more recent times. In this regard, some authors have interpreted in a personalist sense authors such as Alasdair MacIntyre, Hans Jonas and Charles Taylor. Some parts of the works of these authors are seen as focussing on the analysis of the moral sphere in the human person and on the relation between individual and society in the modern age. This is worthy of attention, because it could reveal the convergence of the secular interest and the social doctrine towards the human person.¹⁶⁵

There is one element that links a secular view of the human person with the view that social teaching brings us. This is found in the specificity attributed to the individual human being. For instance, both social teaching and Mounier's philosophy consider the individual human being as unique and unrepeatable. And due to these characteristics, the person, in the RCC's social doctrine, has an intrinsic value. 'Person' and 'individual', in the strict context of the social doctrine of the RCC may indicate two antithetic approaches to the study of social life. In fact, most of the criticism towards the extremism of the modern consumer society and some other modern attitudes have their reasons here. Namely, the RCC considers that there are substantial differences in the distinction between 'an individual' and 'a person'. We look now for the source of this distinction, the element that gives to the definition of the human person a particular substantial character. Thus, it might be proper to ask a question: what, or better, who is at the core of the RCC's social doctrine? The person is the answer we are looking for:

The Church sees in men and women, in every person, the living image of God himself. [...] All of social life is an expression of its unmistakable protagonist: the human person. [...]. The whole of the Church's social doctrine, in fact, develops from the principle that affirms the inviolable dignity of the human person (see JOHN XXIII, Mater et magistra. AAS 53, 1961. 453, 459). [...] The

¹⁶¹ See M. TOSO, Z. FORMELLA, A. DANESE, *Emmanuel Mounier. Persona ed umanesimo relazionale nel centenario della nascita (1905 – 2005)*. Roma: LAS, 2005; M. TOSO, La dottrina sociale della Chiesa per un nuovo umanesimo integrale e solidale, in *Note di Pastorale Giovanile*, 326. 2008. 40 – 52.

¹⁶² D. MELÉ, The firm as a 'community of persons': a pillar of humanistic business *ethos*, in *Journal of Business Ethics*, 106. 2012. 94; P. CARLOTTI, 'Un chiarimento decisivo'. DSC e teologia morale, in P. CARLOTTI, M. TOSO, eds., *Per un umanesimo degno dell'amore. Il 'Compendio della Dottrina sociale della Chiesa'*. Roma: LAS, 2005. 174

¹⁶³ See below VI, 2.2.2.

¹⁶⁴ See below VI, 2.3.

¹⁶⁵ See the recent P. NEPI, *Individui e persona. L'identità del soggetto morale in Taylor, MacIntyre e Jonas*. Roma: Edizioni Studium, 2000. 49 – 56. An overview on these themes is in B. FORTE, *L'uno per l'altro. Per un'etica della trascendenza*. Brescia: Morcelliana, 2003.

dignity of the human person [...] is the foundation of all other principles and content of all the Church's social doctrine¹⁶⁶

We see how the RCC individuates the source of the dignity of the person in the being made as a living image of God. This gives to the human subject a specific character. As we consider this the central theme of the personalist principle in social teaching we see also its relevance in this context. This principle is the root of all the other principles, which then flower from it like leafs from a tree.

The main point which distinguishes the RCC's conception of the human being, is the relation to God. The human being, in RC theology, is God's most important creature, and is created as the closest image of God. From this derives a 'transcendent' dignity, a dignity that transcends the material limits of the individual. The result of this, is that we should consider each other human person as another self:

A just society can become a reality only when it is based on the respect of the transcendent dignity of the human person. The person represents the ultimate end of society, by which it is ordered to the person [...]. It is necessary to 'consider every neighbour without exception as another self, taking into account first of all his life and the means necessary for living it with dignity' (*Gaudium*, 27). Every political, economic, social, scientific and cultural programme must be inspired by the awareness of the primacy of each human being over society (see *Catechism*, 2235).¹⁶⁷

The discussion about the person may not be complete until we talk about transcendence according to social teaching. The consideration that social thought gives to transcendence is due to the fact that through that transcendent character, according to social thought, human beings are able to respect each other. Individual human beings can transcend their personal self and they can see the same dignity that belongs to them also in all other human beings.

The personalist principle implies the primacy of the person in front of the institutions.¹⁶⁸ Social teaching points out how the policies adopted at different levels of society must take into account the human being's individual dignity, which means that the end of preserving the general interest is reached through the preservation of each citizen's dignity.

In the context of social doctrine, one of the main consequences of recognizing a person's transcendent aspects is the possibility to transcend the limitations of one's current perspectives. It would mean to surpass the singularity and particularity of one's own experience, and project oneself towards the universal. To transcend the immediate singularity of the self is, for social doctrine, a relevant pre-condition to the development of fraternity among persons. Transcendence becomes in such a framework a necessary pre-requisite for overcoming a situation in which the material level of living is heavily dominant. All the other people around us are essential in comprehending our own human nature. Through the transcendent regard we put towards other human beings we might understand better their 'being':

¹⁶⁶ *Compendium*, 105 – 107, 160.

¹⁶⁷ *Compendium*, 132.

¹⁶⁸ See *Compendium*, 133.

*Openness to transcendence belongs to the human person: man is open to the infinite and to all created beings. He is open above all to the infinite - God - because with his intellect and will he raises himself above all the created order and above himself, he becomes independent from creatures, is free in relation to created things and tends towards total truth and the absolute good. He is open also to others, to the men and women of the world, because only insofar as he understands himself in reference to a 'thou' can he say 'I'. He comes out of himself, from the self-centred preservation of his own life, to enter into a relationship of dialogue and communion with others. The human person is open to the fullness of being, to the unlimited horizon of being.*¹⁶⁹

If we focus on the last sentences in the quote above, it follows one other relevant conclusion about this characteristic trait of the human person according to the RCC's social teaching. Transcendence is a main trait, a very specific element that characterizes human beings in their openness with each other and in establishing possibilities for dialogue and communion. That is why his transcendent character must be preserved with the greatest care. To transcend the self, that is already an intellectual act, is absolutely necessary to understand both 'I' and 'you'.

In this discourse, the meaning of transcending the self deals with the understanding of the self as in relation with another self. The relation between me and the other has been extensively treated in philosophy. But speaking from a religious point of view about this relation, it means no other thing than speaking about the effort a human has to do for recognizing the common human nature in another person. I transcend myself to see what is human in another person. In the idea proposed in the social doctrine the result is that if we see what pertains to ourselves also in the others, like in a mirror, we are making our first step for a better and more human social co-habitation. More distinctively then, *Compendium* states that only through respect due to each human being's transcendent character is it possible to build justice in society.

3. The common good

The common good is one of the main ends that social doctrine aims to fulfil. It should be considered its clearest practical accomplishment. But here, nevertheless, it is treated as a principle, and we have to define its theoretical content. I will give a description that might be helpful especially for interpreting the common good as a permanent principle. The common good is an ideal for people willing to realize a living-together; and this appears to be interesting especially in an epoch of intense globalization as today is.

As the 'common good' simply expresses by its words, its subject matter is about shared welfare: the good for the community. It is about a fair well-being for everybody. And from the *Compendium* we see that its source is in the fact that we, human beings, are part of the same family. Thus, social doctrine says, we are all equal with regard to our dignity:

¹⁶⁹ *Compendium*, 130.

*The principle of the common good, to which every aspect of social life must be related if it is to attain its fullest meaning, stems from the dignity, unity and equality of all people. According to its primary and broadly accepted sense, the common good indicates ‘the sum total of social conditions which allow people, either as groups or as individuals, to reach their fulfilment more fully and more easily’ (Gaudium, 26. See Catechism, 1905 - 1912; Mater, AAS 53. 417 - 421; Pacem, AAS 55. 272 - 273; Octogesima, 46). The common good does not consist in the simple sum of the particular goods of each subject of a social entity. Belonging to everyone and to each person, it is and remains ‘common’, because it is indivisible and because only together is it possible to attain it, increase it and safeguard its effectiveness, with regard also to the future.*¹⁷⁰

More concretely, the common good calls each human to a personal responsibility towards other people. Such a responsibility finds expression both in close relations and then through the roles in the political and economic institutions one may have. In other words, we could say that fulfilling what social doctrine intends for the common good means that each human person, guided by the good will, is supposed to ponder the everyday actions in the framework of shared welfare:

*Authentic social changes are effective and lasting only to the extent that they are based on resolute changes in personal conduct. An authentic moralization of social life will never be possible unless it starts with people and has people as its point of reference: indeed, ‘living a moral life bears witness to the dignity of the person’ (Catechism, 1706). It is obviously the task of people to develop those moral attitudes that are fundamental for any society that truly wishes to be human (justice, honesty, truthfulness, etc.), and which in no way can simply be expected of others or delegated to institutions.*¹⁷¹

In this sense, responsibility regards each one in daily activities. In this context, there is not a strict scheme to follow, but just having as main end that of contributing to the general welfare. Moreover, the awareness of the role played by persons more than by institutions becomes necessary.

In this perspective, it is therefore necessary that attributes like honesty and truthfulness should primarily originate from one’s personal conscience. Only subsequently such characteristics can be found in the institutions. These considerations do not exclude at all the role of the state in participating in the realization of the common good. On the contrary, the social doctrine finds in the common good the main reason for which the state exists.¹⁷² Only the state can ‘guarantee the coherency, unity and organization of the civil society of which it is an expression’.¹⁷³

The common good does not presupposes a program fixed once and for all, but it is thought to interact with the daily multiple exigencies of individual persons. As the world is complex, the common good reflects this complexity in being pursued and achieved. We can summarize what can be the person’s role in such a context. First, each person has to strive in order to satisfy individual needs, realizing life

¹⁷⁰ *Compendium*, 164.

¹⁷¹ *Compendium*, 134.

¹⁷² See *Compendium*, 168 – 169.

¹⁷³ *Compendium*, 169.

according to personal desires and, to the extent that the person has freedom in doing this, is also responsible for the results. Second, at the same time the person must be aware of the possibility to influence the world of other people. The way a person chooses the objectives, the method chosen for accomplishing them, and the degree of such achievement, are all elements that, more or less, directly or indirectly, may concur to these same aspects in another person's life.

A message coming from the *Compendium* concerning the common good is that being part of the common good implicitly means to fulfil the moral obligations of being a person. Moreover, being part of the common good means that persons share the common good as, at the same time, they contribute to its realization. As just seen above, social thought tells us that only among persons we can experience the common good. This does not mean that persons not sharing or not contributing to the common good are not considered persons. Social thought calls for the responsible moral duty of each person in acknowledging the being part of a community. Bishop Mario Toso quotes the definition of common good given by Jacques Maritain as the 'good human life of the multitude'.¹⁷⁴ Toso identifies this with the ancient *bonum honestum*, the 'honest good', that is a good end in itself regarding the hard exercise of virtue as a mean and as an end of the human living in society.¹⁷⁵ The common well-being means that each one is recognized for his dignity in being a human person. In this way it seems that in the intention of the social doctrine the two aspects, common and personal, fulfil each other. As far as the common good calls for personal responsibility towards others this would mean, translating *Compendium's* words, to take into consideration to submit one's own interest to the interest of others. In social thought, being a person has nothing to do with being egoistic, on the contrary, we are persons when we take care of one other:

*The common good therefore involves all members of society, no one is exempt from cooperating, according to each one's possibilities, in attaining it and developing it (see Mater, AAS 53, 417; Octogesima, 46; Catechism, 1913). The common good must be served in its fullness, not according to reductionist visions that are subordinated by certain people to their advantages; own rather it is to be based on a logic that leads to the assumption of greater responsibility*¹⁷⁶

Recently, such a perspective has been referred to in a study published by the Libreria Editrice Vaticana,¹⁷⁷ the official publisher of the Vatican City state. In reflecting about the meanings and the possibilities of the globalization, ideas like those of Muhammad Yunus,¹⁷⁸ the founder of the Grameen Bank and many other initiatives, have been taken as exemplary.¹⁷⁹ This appreciation comes from the fact that Yunus

¹⁷⁴ See M. TOSO, *Umanesimo sociale. Viaggio nella dottrina social della Chiesa e dintorni*. Roma: LAS, 2001.72.

¹⁷⁵ See TOSO, *Umanesimo sociale*, 72.

¹⁷⁶ *Compendium*, 167.

¹⁷⁷ See G. SCANAGATTA, A. PASETTO, *Sviluppo e bene commune. Per un'economia non separata dall'etica e per un'etica fondata sull'inviolabile dignità dell'uomo*. Città del Vaticano: Libreria Editrice Vaticana. 2012.

¹⁷⁸ See M. YUNUS, *Creating a world without poverty. Social business and the future of capitalism*. New York: Public Affairs, 2007 and M. YUNUS, *Building social business. The new kind of capitalism that serves humanity's most pressing needs*. New York: Public Affairs, 2010.

¹⁷⁹ SCANAGATTA, PASETTO, *Sviluppo e bene commune*, 85 – 89.

has operated taking into account the particular needs and exigencies of the local people. His banking activity is built upon the ‘interest’ that other persons may live a better life through accessing to its particular form of credit. This example shows firstly that social doctrine is proposing something that is not too far from reality. In the context of globalization, the example confirms how the responsibility in building the common good cannot be demanded exclusively of public institutions. Every subject has the responsibility of doing what is in his or her possibilities.¹⁸⁰

This being said, there is another point regarding the common good that needs here to be underlined. It is about the meaning of transcendence in relation to the realization of the common good. If the common good is considered an ‘end in itself’, the *Compendium* warns us, this would lead to the emptying of its meaning. The common good is interpreted as a universal value that regards the whole creation. Which means that it should not be limited to the good shared in common by a limited amount of people. The common good is only pursued when it takes into account all people living in the world. It should represent the horizon, against ego-centric drives, in which we ought to contextualize our socio-economic choices both at the personal and institutional level. But it should not represent an end in itself:

A purely historical and materialistic vision would end up transforming the common good into a simple *socio-economic well-being*, without any transcendental goal, that is, without its most intimate reason for existing.¹⁸¹

Thus, in social thought the common good is not identified uniquely with material welfare. To have the common good intended exclusively in material terms would determine that our well-being would become our end not recognizing that there is a transcendent nature also implied in the common good.

Social teaching points that the common good aims to fulfil human being’s full realization, letting them understand their transcendent value as creatures created by God. Therefore also the common good is a means of preparing, we might say, for the encounter between God and humanity. In this sense, as said in the quote above, the common good does not corresponds with the mere realization of material richness. It implies not only a material transformation of the way we act and we live, but has a transcendent scope which regards closer our spiritual transformation and our attitude towards other persons.

3.1. *The universal destination of goods*

While investigating the common good we come across a related particular principle that is the universal destination of goods. We have seen that this principle was implicitly present in the previous sources of social teaching, but it has been clearly introduced only since Vatican II with *Gaudium et spes*.¹⁸² My intention now, anyhow, is to furnish an analysis of its content.

This principle states that all resources present in nature, and all the wealth that derives from them, are not supposed to be used by only a few people. It should

¹⁸⁰ SCANAGATTA, PASETTO, *Sviluppo e bene commune*, 130 – 138.

¹⁸¹ *Compendium*, 170.

¹⁸² See above III, 6.

be instead a proper economic task to find out the best ways to share all the benefits of such resources. This principle, as the *Compendium* tells us, originates from the fact that all the good things the human beings may have from the world are supposed to be a gift from God.¹⁸³ On different occasions the Pontifical Council Justice and Peace has also underlined how traces of this principle can be found in the Old Testament and in the writings of theologians of the early church.¹⁸⁴

The principle of the universal destination of goods also implies a punctual elaboration of rights and duties within a legal framework. For instance, an individual entrepreneur acting towards the realization of the common good should not find obstructions but only advantages coming from the bureaucratic body.

Thus, from one side, it is up to the single economic actor to strive for the common good and to sacrifice part of his personal material interest for the well-being of others. From the other side, it should be up to the public institutions to furnish adequate frameworks that recognize the necessity of ‘submitting all other rights, private property or free trade, to the universal destination of goods’:

The universal right to use the goods of the earth is based on the principle of the universal destination of goods. Each person must have access to the level of well-being necessary for his full development. [...] It is innate in individual persons, in every person, and has priority with regard to any human intervention concerning goods, to any legal system concerning the same, to any economic or social system or method: ‘All other rights, whatever they are, including property rights and the right of free trade must be subordinated to this norm (the universal destination of goods); they must not hinder it, but must rather expedite its application.’¹⁸⁵

There is an interesting element here. It is explicitly stated by the *Compendium* that in social thought private property must be submitted to the universal destination of goods. Both principles are considered as expressions of natural rights. The universal destination of goods has ‘priority’ over all other principles regarding the administration and possession of goods. This hierarchy established in these social principles regards the responsibility of the richer towards the poor already seen before.¹⁸⁶ In other words, this means that the possession of things in RCC’s thought, needs to have as final goal the realization of the common good. We are going to analyse this relationship more in detail now.

3.2. Private property and the universal destination of goods

Is there a disagreement in the fact that private property has in RC social teaching the status of a natural right, but at the same time it is subordinated to another right, namely the universal destination of goods?

To begin with the right on private property is not denied. Social teaching officially recognizes it as a natural right since *Rerum novarum*. To possess, even to

¹⁸³ *Compendium*, 171.

¹⁸⁴ See on this JUSTICE ET PAIX [PONTIFICAL COUNCIL FOR JUSTICE AND PEACE], *Colloque International ‘Un terre pour tous les hommes’*. Paris: Éditions du Centurion, 1992.

¹⁸⁵ *Compendium*, 172.

¹⁸⁶ See above I, 2.

possess a lot, to be very rich, is not by itself something evil, bad, or sinful that the RCC wants to forbid. The value judgement concerns the use and the end that the rich person wants to attain. It is not to be rich which is sinful, but to devote oneself exclusively to richness. In other words, what is relevant in the RC view is the use of the things possessed, not their possession.

Actually, trying to answer the introductory question of this sub-chapter, we should not speak of a disagreement between two principles, but of the need for a hierarchy between two human necessities established in social teaching. One is that of personal possession, and the other one is about sharing that possession. This latter is mainly the need of those who do not own enough for themselves. The first, according to RC social teaching, is a means to achieve the latter and the duty of someone who owns something.¹⁸⁷ The hierarchical relation between the two principles schematizes their role in the whole context of social thought: the sharing of goods is an objective, while the private property is an instrument to reach that end. This means that the principle of the universal destination of goods implies for its concretization that the human persons have to act according to the implementation of the general welfare and not exclusively according to their proper and legitimate interests.¹⁸⁸ This perspective identifies who owns something more with the figure of an administrator than that of a mere possessor. The person is an administrator or steward because the person is charged with the responsibility of doing something with the possessed goods, that is not just private use. In this direction goes also the traditional view of the theologians of the early church, re-proposed through the *Compendium* and individually by various popes.¹⁸⁹ Therefore, RC social thought makes a distinction in the assignment of roles to some human faculties.¹⁹⁰ Namely, to possess is relevant but it is not an absolute right. On the contrary, what is absolutely decisive for society is the use of that possession for communal purposes:

*Christian tradition has never recognized the right to private property as absolute and untouchable: 'On the contrary, it has always understood this right within the broader context of the right common to all to use the goods of the whole of creation: the right to private property is subordinated to the right to common use, to the fact that goods are meant for everyone' (JOHN PAUL II, *Laborem exercens*. 14. AAS 73. 1981). [...] This principle is not opposed to the right to private property (*Rerum, Acta* 11. 102) but indicates the need to regulate it.*¹⁹¹

¹⁸⁷ About the theoretical role of private property as a way to reach the universal destination of goods, see also the intervention of J-Y. CALVEZ, *Les moyens d'assurer la destination universelle des biens*, in *Colloque International 'Un terre pour tous les hommes'*.

¹⁸⁸ See *Compendium*, 178.

¹⁸⁹ See above I, 2. St. Ambrose of Milan quoted by pope Paul VI summarizes the position: 'You are not making a gift of what is yours to the poor man, but you are giving him back what is his. You have been appropriating things that are meant to be for the common use of everyone. The earth belongs to everyone, not to the rich.' (*De Nabute*, c. 12, n. 53, PL 14. 747; see J. R. PALANQUE, *Saint Ambroise et l'empire romain*. Paris: De Boccard, 1933. 336). These words indicate that the right to private property is not absolute and unconditional. No one may appropriate surplus goods solely for his own private use when others lack the bare necessities of life.' *Populorum*, 23.

¹⁹⁰ See *Compendium*, 178.

¹⁹¹ *Compendium*, 177.

Once the distinction and the relation between the possession of goods and their universal destination have been presented, there is another aspect. It regards the recognition made by the *Compendium* towards other forms of possession. For what concerns private property, the *Compendium* states that individual property is not the unique form of property we could rely on. Maybe, suggesting in this way that the implementation of other forms of possession can be fruitful for the objective of sharing the wealth as well.

A veiled criticism is made towards a widespread contemporary economic praxis of intending property as only belonging to an individual. Instead, in the RCC's opinion, we could learn a lot from our ancestors, or from far away populations and also from developing countries. In these contexts, that can be non-Western, other forms of property are practised at the same degree or even more often than individual private property. Generally these forms are ways of communal possession. Thus, while not denying the importance of private property, social teaching would also remind us that we very well can possess something, but the individual way of doing it is not the ultimate and definitive way:

*If forms of property unknown in the past take on significant importance in the process of economic and social development, nonetheless, traditional forms of property must not be forgotten. Individual property is not the only legitimate form of ownership. The ancient form of community property also has a particular importance; though it can be found in economically advanced countries, it is particularly characteristic of the social structure of many indigenous peoples. This is a form of property that has such a profound impact on the economic, cultural and political life of those peoples that it constitutes a fundamental element of their survival and well-being. The defence and appreciation of community property must not exclude, however, an awareness of the fact that this type of property also is destined to evolve. If actions were taken only to preserve its present form, there would be the risk of tying it to the past and in this way compromising it (see *Gaudium*, 69).¹⁹²*

It is interesting to notice one thing from the above quote. We observe how the social doctrine is not directly proposing a specific and punctual alternative. There is a general reference to the possibility that property in 'traditional forms' has its place in the economic setting of today. What is directly addressed is the possibility that possessing finds its place also in the 'community'. Given the legitimate character of the individual property, this does not exclude that there can be possession also in other forms.

The social doctrine identifies these 'forms of property' with traditional ways of possessing in common. In this sense, we can read the proposal for re-discovering such traditional or ancient forms. Moreover, according to social teaching, such forms may be present both in economically advanced and less economically developed countries. This implies the respect for other forms of property even if they do not coincide with the form of the individual property.

Thus, a practical result of this view of social teaching is that other forms of property, such as communal property can fit with the ideal of the common good.

It is also possible that they are already present in local contexts as ancient forms of exchange. In this case, social teaching proposes a way for re-thinking

¹⁹² *Compendium*, 180.

economic development in our contexts, using traditional forms of possession as an inspiration for us. It is then specified how the ways of possessing things are subjected to development. Therefore, the preservation of traditional forms should not block their development, or discourage the introduction of new forms in those same contexts. In the end, it might be an interesting a fruitful idea that of looking to diverse forms of ownership in different times and places. This sense this might inspire our development and the way we decide to administrate our wealth.

4. *The subsidiarity principle*

The subsidiarity principle is constantly present in all of the RCC's social teaching since the first social encyclical, *Rerum novarum*, and then it is continuously reaffirmed, like in *Quadragesimo anno* where it is better specified and formalized, and in the update made in *Caritas*.¹⁹³ Its permanent presence is due to the contribution it gives to the achievement of human being's full dignity in the sense adopted by social teaching. This principle allows an interpretation of the individual citizen as not absolutely subordinated to institutions. The motto that summarizes this principle was adopted by Pius XII and confirmed by subsequent popes: *civitas propter cives, non cives propter civitatem*.¹⁹⁴ Society is for the person and not the person for society.

To correctly explain this principle we have to start from the assumption that we are considering in society the existence of at least two main different levels of intervention. The first we may identify is civil society. It is composed both by citizens in their individuality and by their free ways of association in the widest sense, from family to sport teams. The second is the public institutional level, also formed by citizens, but which does not act as a person but as an institution. This second does not build relationships by itself and cannot take into consideration each possible singular personal necessity. Institutions act by definition towards public and general welfare but, due to their inner functioning mechanisms. They cannot take into account each single request coming from members of civil society otherwise they will be charged with too many tasks, risking collapse. That is why institutions have to choose, among the many, which are the interests suitable to be satisfied for the general welfare of society as a whole.

If, from one side the person is considered preceding the state, from another side, the subsidiarity principle's observance requires awareness from the single person to be part of civil society. Moreover, the principle requires from him the voluntary action for improving civil society in new and effective forms of socialization.

The content of the principle can be described as follows: when the individual citizen, or associations of citizens, can act in a social environment for improving the social environment, the citizens should be free from any institutional structure or

¹⁹³ See *Compendium*, 185; *Quadragesimo* 79; *Caritas*, 57; and below VII, 3.1., 3.2. See P. MAGAGNOTTI, *Il principio di sussidiarietà nella dottrina sociale della chiesa*. Bologna: Edizioni Studio Domenicano, 1991. 21; J-B. D'ONORIO, La subsidiarité, analyse d'un concept, in ACTES DU XII^e COLLOQUE NATIONAL DE LA CONFÉDÉRATION DES JURISTES CATHOLIQUES DE FRANCE, *La subsidiarité. De la théorie à la pratique*. Paris: Téqui, 1993. 16.

¹⁹⁴ See MAGAGNOTTI, *Il principio di sussidiarietà nella dottrina sociale della chiesa*, 15.

barrier in doing it. The individual person needs to have the own space in determining which are the most accurate and effective forms of action at the social level for satisfying the personal needs.

The RCC assumes that at the level of civil society the individual person is more able both to detect problems, needs and necessities, and to find solutions and social frameworks for them. In this, social teaching appears to be in agreement with those political systems where the subsidiarity principle is at work. In this respect the European Union is a major example.¹⁹⁵ Here, the subsidiarity principle is explicitly recognized since 1992, with the Treaty on European Union in Maastricht. In Europe the subsidiarity principle states that, for subjects that are not specific competence of the European Union, the decisions should be taken as closely as possible to the level of citizenship. Hence, an intervention by the European Union is justified only when solutions at local, regional or national level might be inappropriate. The *ratio* behind this principle is, as in social teaching, the assumption that at a closer level of intervention the measures can be more effective in matching the citizens' interests.¹⁹⁶

Thus, the institutional role is just that of guaranteeing for the citizens enough juridical tools for building their own path. The meaning of the Latin word *subsidium*, as 'help', refers to this case. Namely, public institutions should provide the economic and juridical help to the other levels of civil society leaving to these lower levels the necessary institutional space for properly operating:

*On the basis of this principle [subsidiarity], all societies of a superior order must adopt attitudes of help ('subsidium') - therefore of support, promotion, development - with respect to lower-order societies. In this way, intermediate social entities can properly perform the functions that fall to them without being required to hand them over unjustly to other social entities of a higher level, by which they would end up being absorbed and substituted, in the end seeing themselves denied their dignity and essential place.*¹⁹⁷

From what was written above, we should interpret the observance of the subsidiarity principle as a firm opposition to an excessive public intervention, bureaucratization, and centralization of decision-making processes and waste of public energies.

Social teaching claims that while exercising the principle of subsidiarity we exercise respect for human persons in all their multiple ways of expression in society. The intervention of public authorities, as briefly mentioned above, is conceived to be effective only in those situation in which the individual, or many individuals, cannot practically succeed with their own forces, for instance when it is required an unusual and wide economic intervention, or in regards of heavy and urgent unbalances in social justice.¹⁹⁸ Moreover, we can argue that individuals have the characteristic of creativity, which is usually unknown to institutions. Through this, it is possible for them to foresee ways totally unreachable for impersonal entities like institutions are.

¹⁹⁵ See J-P. JACQUÉ, La subsidiarité en droit communautaire; F. SCHWERER, La subsidiarité dans l'organisation européenne ou le détournement d'une valeur chrétienne, both in ACTES, *La subsidiarité. De la théorie à la pratique*.

¹⁹⁶ More details can be found in the European Parliament's website: <http://www.europarl.europa.eu/factsheets/122/en.htm>

¹⁹⁷ *Compendium*, 186.

¹⁹⁸ See *Compendium*, 187 – 188.

5. *The solidarity principle*

According to social thought, the need for this principle is particularly tangible in our contemporary interwoven world. Social thought considers humanity as one single global family. Thus, in such a family as in any other, solidarity should be its basis. We will see a similar attitude while analysing the later part of *Caritas*.¹⁹⁹

From the consideration of humanity as a global family it is easier to understand the bond of solidarity that links all the people of the world. In a family all the parts should cooperate and are ready to help each other. In social thought's view the same applies in the world. Moreover, we should interpret the world on the basis of the principle of solidarity. In regards of this global attitude regarding the solidarity principle, the *Compendium* largely draws from the interpretation given by John Paul II in his social encyclical *Sollicitudo rei socialis*. Indeed, *Sollicitudo* and its themes on solidarity and the full development of people through solidarity,²⁰⁰ are addressed to the whole world, and not only to part of it.²⁰¹

The new information technologies have given an enormous contribution in enlightening these bonds as present on a global scale. Indeed, technologies have given humanity the possibility to exchange enormous amounts of information in a short time, from parts of the world very far from each other. As the RCC's teaching constantly points out, the world is increasingly more interdependent regarding knowledge of each other; the circulation of information has reached today levels never seen in the past.²⁰² This phenomenon should cause in our attitude more responsibility towards other human beings, not only because we see them suffering, but also because we see that they are persons like us. The reasoning is that to know more and better other people and their social conditions can enhance a person's inner socialization character.²⁰³ Thanks new technological developments, the Roman Catholic Church sees also a path towards an augmented consciousness about different populations and the fact that we live in the same world, and that we are dependent upon each other. In the end, growth in reciprocal knowledge can provide better knowledge of those bonds of solidarity that social teaching sees as partly already present but that need also to be improved.

In this sense new technologies help the implementation of cohesion among peoples through the interdependence they enlighten. New technologies can also give us more evidence about the fact that we live in a world where there are 'stark inequalities between developed and developing countries'.²⁰⁴ In such a context, to promote social justice is not something that can be confined within the borders of a

¹⁹⁹ See below VIII, 2.2.

²⁰⁰ See *Sollicitudo*, 38 – 40; F. BIFFI, Cinque letture dello sviluppo dei Popoli. Guida introduttiva all'enciclica '*Sollicitudo rei socialis*', in PONTIFICIA UNIVERSITÀ LATERANENSE, *Le ragioni della speranza. Studi sull'enciclica Sollicitudo rei socialis*. Città del Vaticano: Libreria Editrice Vaticana. 1988. 160 – 169.

²⁰¹ See M. TOSO, Principali contenuti e aspetti di novità nella '*Sollicitudo rei socialis*', in M. TOSO, ed., *Solidarietà, nuovo nome della pace. Studi sull'Enciclica 'Sollicitudo rei socialis' di Giovanni Paolo II offerti a don Giuseppe Gemmellaro*. Torino: Editrice Elle Di Ci, 1988. 28

²⁰² See also *Message of the Holy Father Benedict XVI for the 42th World Communications Day 2*, May 4, 2008.

²⁰³ See *Compendium*, 192.

²⁰⁴ *Compendium*, 192.

single state. According to RCC's social thought, solidarity as a social principle can be a contemporary way for expressing human friendship and fraternity. This global accent in the understanding of the solidarity principle is also pointed out in official documents prepared with regards to the definition of a responsible citizenship in the contemporary world.²⁰⁵

Social thought intends the principle of solidarity also as a moral virtue that should order the life of institutions.²⁰⁶ Solidarity is considered the social criterion by which institutions are coordinated internally. It also represents the organizing criterion for the relations among different institutions, and between institutions and the civil society. Regarding especially this last aspect, the effort the social teaching proposes implies the modification of certain institutionalized rules in the economic context.

To do this, it has been pointed out that two principles, solidarity and subsidiarity, should be applied together.²⁰⁷ This means that the less institutionalized levels of society, for instance the civil society, or civil associations in general, should be more free from higher institutional barriers. In the end, in the context of the market economy, solidarity does not mean less regulation for the market, but more freedom to operate also outside the market. In this sense then, the implementation of real solidarity would call for an implementation of subsidiarity.

Social teaching indeed speaks of 'structures of solidarity', that can be realized through the 'appropriate creation or modification of laws, market regulations, and juridical systems'.²⁰⁸

Then, the content of this principle should appear clearer if we think of solidarity as a moral virtue, namely as something inherent to the individual's moral conscience.

In defining solidarity as a moral virtue the *Compendium* says that

*Solidarity must be seen above all in its value as a moral virtue that determines the order of institutions. [...] Solidarity is [...] an authentic moral virtue, not a 'feeling of vague compassion or shallow distress at the misfortunes of so many people, both near and far. On the contrary, it is a firm and persevering determination to commit oneself to the common good. That is to say to the good of all and of each individual, because we are all really responsible for all (JOHN PAUL II, Sollicitudo Rei Socialis. AAS 80, 1988. 565 - 566. 38).*²⁰⁹

Solidarity expresses itself as a moral virtue and not merely as a sentimental empathy with another's suffering, but an expression of the necessary will of practising justice in society. In this perspective, social thought speaks about the fact that each person should see himself as indebted towards society in as far as society coincides with that entity that allows persons to be born, grow and realize their personal life according to

²⁰⁵ See, for instance, UNITED STATES CONFERENCE OF CATHOLIC BISHOPS, *Faithful Citizenship. A call to political responsibility*. Washington, D.C.: 2011. 15. Available online at: <http://www.usccb.org/issues-and-action/faithful-citizenship/>

²⁰⁶ *Compendium*, 193.

²⁰⁷ See S. ZAMAGNI, Linee di un disegno istituzionale in campo economico che coniughi sussidiarietà e solidarietà, in S. ZAMAGNI, ed., *Economia solidale*. Casale Monferrato: Edizioni Piemme, 1996. 9 – 13.

²⁰⁸ *Compendium*, 193.

²⁰⁹ *Compendium*, 193.

their exigencies.²¹⁰ Once we are able to give back something to society, we should do it. This ‘giving back’ can precisely represent a manner of exerting justice through solidarity.

In its deeper meaning solidarity has its origin in the Gospel. In fact, in the *Compendium* solidarity represents the privileged way for the realization of the common good, through the teaching of Jesus, for which solidarity means

[...] in the Gospel sense, to ‘lose oneself’ for the sake of the other instead of exploiting him, and to ‘serve him’ instead of oppressing him for one’s own advantage (see Mt 10: 40 - 42, 20: 25; Mk 10: 42 - 45; Lk 22: 25 - 27)(see *Sollicitudo*, 38; *Laborem*, 8; *Centesimus Annus*. 57. AAS 83, 1991. 862 - 863.).²¹¹

Presented in this way, the solidarity principle deserves a central role in the entire context of social doctrine. Regarding the socio-economic situation, Dionigi Tettamanzi, Archbishop of Milan from 2002 to 2009, emphasized that ‘there is no future without solidarity’.²¹²

²¹⁰ See *Compendium*, 195.

²¹¹ *Compendium*, 193.

²¹² See D. TETTAMANZI, *Non c'è futuro senza solidarietà. La crisi economica e l'aiuto della Chiesa*. Milano: San Paolo, 2009.

Chapter V – Human labour in Roman Catholic social teaching

1. Introduction

A large part of the individual's economic life is dedicated to human work. That is why an investigation on social doctrine's principles about economic life would be incomplete if not treating this topic. In this chapter I will analyse what the Roman Catholic Church' social teaching believes is the value and position of human labour in social and economic life. In the *Compendium of the social doctrine of the Church* work and workers do receive attention due to the view that social thought proposes, for which workers are at the core of the production process.

I will start with an explanation of the Bible on labour in the framework of Roman Catholic theology. Then, there will be also the occasion to present the actual character of *Rerum novarum* (1891) regarding capital and labour. Indeed, about the worker's condition, *Rerum* is seen in social teaching as a forerunner of the teachings of the Second Vatican Council as well as of later thinking.²¹³

2. Biblical aspects. Old Testament and Gospel

Within the theological framework of Roman Catholic social thought to start with the Old Testament means to start from the beginning. The Old Testament would give a first understanding of why human beings have to work, and how they have to work. This inquiry, in such a perspective, may shed some light upon the meaning that the social doctrine gives to human labour, and the specific implications in the whole social thought.

The social teaching of the RCC, as just said regarding other topics,²¹⁴ strongly relies on the Old Testament, in this way legitimizing its theological foundation. In the specific case of developing a doctrine of work, the whole discourse starts from the theological interpretation of the human being as created in God's image.²¹⁵ From this, it follows that human beings, through their work, are also creators, as God is. Close to this view it has been pointed how from a religious biblical perspective that the human being is a worker as also God is a worker.²¹⁶

Such reading of the creation in God's image gives the possibility for a theology of labour in the RCC:²¹⁷

²¹³ See G. FROSINI, *L'attività umana. Per una teologia del lavoro*. Milano: Edizioni San Paolo, 1994. 130.

²¹⁴ See above I, 2.

²¹⁵ See also UNITED STATES CONFERENCE OF CATHOLIC BISHOPS, The Christian vision of economic life, in J. HEINE, C. BROOKE, eds., *A worker justice reader. Essential writings on religion and labor*. Maryknoll, NY: Orbis Books, 2010. 80.

²¹⁶ See M. D. MEEK, God and work, in HEINE, BROOKE, *A worker justice reader*, 126 – 137.

²¹⁷ See M. D. CHENU, *Pour une théologie du travail*. Paris: Seuil 1955. 16 – 20; A. M. BAGGIO, *Lavoro e dottrina sociale cristiana. Dalle origini al Novecento*. Roma: Città Nuova, 2005. 58 – 60; FROSINI, *L'attività umana*, 156 – 162.

*The Old Testament presents God as the omnipotent Creator (see Gen 2: 2; Job 38 - 4; Ps 104, 147) who fashions man in his image and invites him to work the soil (see Gen 2: 5 - 6), and cultivate and care for the garden of Eden in which he has placed him (see Gen 2:15). [...] The dominion exercised by man over other living creatures, however, is not to be despotic or reckless; on the contrary he is to 'cultivate and care for' (Gen 2: 15) the goods created by God. [...] Work is part of the original state of man and precedes his fall; it is therefore not a punishment or curse.*²¹⁸

According to social thought, human beings are responsible for something that they find as already given and have not created. This interpretation is not without consequences in the social doctrine.

The human being is considered the full administrator of everything there is in the created world, because creation itself is a good thing that God wants to give freely to human beings. Human responsibility for the created world descends from God's will to put the human beings in a privileged position in such a creation. Thus to work in such a creation for using its goods becomes primarily a human duty assigned by God.²¹⁹

Nevertheless, in social teaching this duty is not intended as a burden for humankind, or as something that oppresses human beings, or something extraneous to human nature. Quite the opposite, labour represents an opportunity that God gives to human beings for their fulfilment. More generally, in Roman Catholic theology working is considered a natural human activity and concerns both the full realization of being human according to God's plan and a concrete contribution to God's creative work.²²⁰

Within social thought's understanding of the biblical message, it is also relevant to put some light on an apparent contradiction. This could arise about the fact that God gives freely to humanity all that is necessary to live, while at the same time, human beings still must work and struggle to have from such a raw creation the goods they need, as not everything they need is ready in nature.

Moving to the Gospel then, the figure of Jesus is presented as a worker. Jesus, in social thought's theology, is the God who makes himself human, and as a human being he had to work too. Moreover his work was manual labour. He was obedient to his father Joseph (see *Lk* 2: 51) and with his dutifulness he was condemning the attitude of a lazy servant hiding his talent (see *Mt* 25: 14 – 30). Moreover Jesus often refers to his mission in this world as a work he has to accomplish for his Father.²²¹ Obviously the implications of this latter sort of 'work' are different from the social aspects of the work that mostly interest us in this research.

In presenting Jesus the carpenter, social teaching ascribes a real meaning to labour and exposes the errors we should avoid in considering the human work:

²¹⁸ *Compendium*, 255 – 256.

²¹⁹ See *Compendium*, 264.

²²⁰ See FROSINI, *L'attività umana*, 264; G. THILS, *Théologie des réalités terrestres*. Bruges – Paris: Desclée de Brouwer, 1968. 4, V; A. AUER, *Weltoffener Christ*. Düsseldorf: Patmos-Verlag, 1960. 3, VIII; J. ROZIER, *L'homme au travail. L'encyclique Laborem exercens de Jean-Paul II. Présentation, texte, commentaires*. Paris: Éditions du Centurion, 1982. 100 – 103.

²²¹ *Compendium*, 259.

*In his preaching, Jesus teaches man not to be enslaved by work. Before all else, he must be concerned about his soul; gaining the whole world is not the purpose of his life (see Mk 8: 36). [...] When people are worried and upset about many things, they run the risk of neglecting the Kingdom of God and His righteousness (see Mt 6: 33), which they truly need. [...] Work represents a fundamental dimension of human existence as participation not only in the act of creation but also in that of redemption. [...] Understood in this way, work is an expression of man's full humanity, in his historical condition and his eschatological orientation.*²²²

In this passage the risk that work can procure with its absolutization is stressed. Social teaching warns against a mentality that puts labour above all other activities. It is an error to regard labour an absolute value. These aspects have been especially underlined in *Laborem exercens* by John Paul II.²²³

Jesus' labour, within social teaching's proposal, should also represent for the individual believer a way of salvation. With their everyday work, human beings participate in the toil for redemption. Labour, in RC social thought, can be seen as the cross each one has to carry daily in imitating Jesus Christ. This perspective is also a concrete call for lay people in their everyday duty of bringing their work to fulfilment honestly and without laziness. Labour becomes in *Compendium's* theology, a sort of privileged means to reach our full humanity while co-operating with the Lord.

In the end, work is seen as something belonging to our human nature. It is a basic human activity. Therefore it should be considered together with those elements concurring to the realization of the self, such as freedom, respect, dignity, charity, etc.

Notwithstanding this basic human trait of the working activity, there is something that transcends work's deeper meaning. This consideration derives from the fact that work is intended in its relation with the creative action of God. In fact, through labour human beings can imitate God in the act of creation. Then, the toil that human work brings, it is seen as one of the inheritances of original sin. Nevertheless this can correspond to a way for sharing Jesus suffering, participating in his sacrifice in our everyday life, and thus finding also through the daily work a way of redemption.²²⁴

3. The subjective and objective side of human labour. Labour and capital

In introducing the discourse about the dignity of the worker we could say that according to social thought there is a very simple syllogism to consider. The premises of the syllogism are: first, the human person has the highest possible dignity as he is a transcendental being, and second, the worker is a person.

²²² *Compendium*, 260, 263

²²³ See J-Y. CALVEZ, *Nécessité di travail. Disparition d'une valeur ou redefinition?* Paris: Les Éditions de l'Atelier / Éditions Ouvrières, 1997. 108.

²²⁴ See S. MOSSO, *La Chiesa e il lavoro*. Roma: Edizioni Lavoro, 1982. 57 – 72; UNITED STATES CONFERENCE OF CATHOLIC BISHOPS, *The Christian vision of economic life*, in HEINE, BROOKE, *A worker justice reader*, 83.

Conclusion: the worker has the same dignity, the highest, as the person. Keeping in mind this would perhaps help us to go through topics like the relationship between labour and capital and work and private property.

Primarily inspired by *Laborem*,²²⁵ the *Compendium* distinguishes between an objective and a subjective dimension in human work.²²⁶ We need to refer to this distinction because it determines what interests the Roman Catholic Church within the discourse about human work. In fact, this interest is mostly directed towards the subjective side of human work, which is identified with the human person as a worker. The objective aspect of labour, then, regards the whole set of tools, resources and instruments, including technology and economics, which give to human beings the possibility, of subjugating the world, and to draw from the earth what humans need to live. The objective side of labour is characterized by a certain instability. It mutates with time, as means of development change according to different epochs. In other words, with the objective side we are speaking of the framework the humans have built for gaining from their natural environment things to satisfy their needs.

The subjective side of human work coincides, in social thought's view, with the personal and spontaneous character of human beings. It regards the possibility of each human being to act for the realization of the self. As the subjective side of work concerns the human person, it represents the stable aspect of the two. Because even if we can say that workers' personalities change through time, or that they evolve, still they are considered always persons.

The human person is the subject always concerned in labour and the constant element that needs the highest attention. Remarkably, in social teaching's perspective neither production nor profits are the most relevant elements in the process of human work.²²⁷ The subjective side is the element from which originates the dignity that social teaching recognizes to the human labour. In other words, when we speak of the dignity of labour in general, or in the working environments, we are in the end speaking about the worker's dignity.

The *Compendium* stresses that the worker is the central element of labour activity, and also that he cannot be anything but the end of any working process, in the sense that work is made by human beings for the human being. To work is a duty, but it is a duty carried on to fulfil a human end.²²⁸ The activity of work can be defined as an activity at the service of the human being.

In social teaching, the occasion from which the subjective side of labour emerges is exactly the working process. Here, social thought takes into consideration the role of human work in relation to capital and all other elements involved in the production process. More specifically, according to this theology of labour, capital, the objective side of work, represents only a means in the hands of people. Capital's growth should not be the ultimate end of the worker's efforts, nor should it be the ultimate end of the entrepreneur. These considerations find also confirmation in the general attitude that social teaching has towards profits in the world of the enterprise.²²⁹

²²⁵ ROZIER, *L'homme au travail*, 40 – 46.

²²⁶ *Compendium*, 270; *Laborem*, 5 – 6.

²²⁷ See *Compendium*, 270.

²²⁸ See *Compendium*, 272; ROZIER, *L'homme au travail*, 45 – 46.

²²⁹ See above I, 3.

The RCC's social teaching firmly points out that these two elements, labour and capital, are interwoven and they need each other. Capital alone is unworthy, while workers without capital investments in resources and infrastructures are out of place. This assertion comes from Leo XIII's *Rerum*. The *Compendium* says that the claim that labour and capital need each other derives from observing the process of production in typical Western economies, in which the two elements are constantly interacting. Labour and capital are both human expressions, but social teaching states the superiority of labour among all other productive factors:

Work, because of its subjective or personal character, is superior to every other factor connected with productivity; this principle applies, in particular, with regard to capital. [...] Labour has an intrinsic priority over capital. 'This principle directly concerns the process of production: in this process labour is always a primary efficient cause, while capital, the whole collection of means of production, remains a mere instrument or instrumental cause. This principle is an evident truth that emerges from the whole of man's historical experience' (Laborem, 12).²³⁰

While affirming the ontological superiority of labour in the work/capital relationship, social teaching also underlines the inescapability of this bond. The tie between labour and capital evolves, calls for new paths able to avoid clashes and improve collaboration. And indeed in this perspective social thought understands trade unions.²³¹ It is probably the case that these two elements composing the modern way of production are supposed to be in tension. But in such a situation, social thought calls for the recognition of the primary relevance of the human element represented by the worker over the materiality of the capital, even if not denying the basic role of this latter. Capital is supposed to be always a means to human's service. In other words, in the capitalist economic system, as here understood, the exploitation of capital is in the service of human workers, and not vice versa, that is workers in the service of capitals.²³²

4. Right to work and rights of the workers

Social thought states that work is a fundamental right and a good thing for humankind.²³³ It is a right because it contributes to fulfilling one's ambitions in the sense that it is necessary to work for building and sustaining a family, having some rights of propriety over things, and for generally contributing to global development.²³⁴ Furthermore social thought considers a high unemployment a huge

²³⁰ *Compendium*, 276 – 277.

²³¹ See *Compendium*, 305 – 307. For a general religious perspective on trade unions see also INTERFAITH WORKER JUSTICE, Why unions matter, in HEINE, BROOKE, *A worker justice reader*, 12 – 19. By the same author, focussed on the United States, see Historic highlights of the religion-labor movement, in HEINE, BROOKE, *A worker justice reader*, 34 – 37.

²³² See ROZIER, *L'homme au travail*, 62 – 65; MOSSO, *La Chiesa e il lavoro*, 111 – 117.

²³³ See *Compendium*, 287; *Gaudium*, 26; *Laborem*, 9; JOHN PAUL II, *Address to the Pontifical Academy of Social Sciences*, 3. 1997; JOHN PAUL II, *Message for the 32nd World Day of Peace 1999*. AAS 91, 1998. 382 – 383.

²³⁴ *Compendium*, 287.

failure of society and sets the end of full employment as an objective that cannot be renounced.²³⁵ In fact social teaching recognizes a right to work for each human being. A right to work exists because through labour human beings can build their life.

In the intention of the social doctrine labour's dignity must be heightened to the rank of a human right legally recognized by today's legislations.²³⁶

Together with the right to work, there are the rights of the worker. It might be possible to point out, after what we have seen so far, that social thought sets a list of rights individuated by the theological interpretation of Biblical passages regarding workers.²³⁷ They are: the right to a just wage, the right to rest, the right to a healthy working environment, the right to have personal dignity respected while working, the right to have some type of social security, the right to a pension and insurance, the right to social protection during maternity, the right to have assemblies and representation.²³⁸

Social teaching considers the right to have a just wage the most important one. This is a right linked with social justice and to the general welfare of a country. In this view, we should put at the centre of our attention how goods are produced, more than the quantity and quality of such goods. If the quantity in the production is emphasized, one might become worried about how workers are employed, or until which extent their rights are respected in regard, for instance, to their productivity. Furthermore, these issues become particularly relevant in the globalized world. In this context they are related with the outsourcing of productive factors,²³⁹ as we will see also in *Caritas*.²⁴⁰

What we are facing is social thought's proposal for inviting reflection or re-thinking the human element in labour, as that which should be the most relevant element:

Remuneration is the most important means for achieving justice in work relationships (see Laborem, 19). [...] They commit grave injustice who refuse to pay a just wage or who do not give it in due time and in proportion to the work done (see Lv 19: 13; Dt 24: 14 - 15; Jas 5: 4). [...] The simple agreement between employee and employer with regard to the amount of pay to be received is not sufficient for the agreed-upon salary to qualify as a 'just wage', because a just wage 'must not be below the level of subsistence' (Rerum, Acta 11. 131) of the worker: natural justice precedes and is above the freedom of the contract. The economic well-being of a country is not measured exclusively by the quantity of goods it produces but also by taking into account the manner in which they are produced and the level of equity in the distribution of income, which should allow everyone access to what is necessary for their personal development and perfection [...].²⁴¹

²³⁵ *Compendium*, 288.

²³⁶ See *Compendium*, 287 – 293.

²³⁷ See FROSINI, *L'attività umana*, 156 – 202.

²³⁸ See *Compendium*, 301.

²³⁹ See also P. K. BRUBAKER *Globalization and its impact on labor*, in HEINE, BROOKE, *A worker justice reader*, 20 – 25.

²⁴⁰ See below, VII, 1.2.

²⁴¹ *Compendium*, 302 – 303.

It might be noticed how, in the first part of this quote, social teaching expressly puts the natural right to have a just wage above freedom of contracting. Following this reasoning this statement might be the first concrete step in wealth redistribution. Maintaining the definition of *Rerum novarum* (1891), a ‘just wage’ is considered that that is not beneath the level of subsistence.

The implicit question is: how could a public institution guarantee a decent redistributive task when it is not giving in the first place legal assurances on a decent level of retribution? It might be interpreted as a call for protecting a minimum level of retribution that, according to different contexts and situations, allows workers to plan and build their life, and eventually a family life. Without such intentions towards workers we would face not freedom of contracting, but the risk of a concrete way of exploitation of the employee by the employer.

Most probably, here the problem does not regard uniquely the governments, but also individual actors not acting effectively for the common good. If the intention is to exploit a situation that is economically favourable only in the short-term, there is the risk of having social damage in the mid and long-term. In this regard, also *Caritas* will point out again how short-term views in the economic decisions of the individual can cause imbalances.²⁴²

5. Res novae. *The ‘new things’ in the world of labour and some concluding words on social doctrine in a globalized world*

There are some recent changes that are, in one way or another, to a greater or lesser degree, affecting our own Western, economic and social arrangements. This is due to the fact that the world is more interdependent,²⁴³ so that a modification in one part of the globe may have consequences in another part. Indeed, interdependence as we are experiencing it in contemporary times is itself a new thing unknown before modernity.

The ‘new things’ that social teaching is considering mainly regard new technological developments, for which new jobs arise and others disappear. In developed countries the service sector and information technology constitute new directions in working activity. In the view of social teaching, these new sort of jobs partially but consistently take over manual work as the need for immaterial services grows.²⁴⁴ Another relevant implication of this phase is observed by social thought in the passage towards less conventional forms of work, like all kinds of temporary or unstable occupations. This phenomenon is partially an answer to higher needs of flexibility that the global markets ask for. At the same time the *Compendium* does not forget to underline how these same types of work produce instability, insecurity and create barriers to long-term projects in individual lives.²⁴⁵

Social thought understands these market modifications not as the cause of instabilities. On the opposite, those instabilities and insecurities in the market are an

²⁴² See, for instance, VII, 4, 5.

²⁴³ See BRUBAKER, Globalization and its impact on labor, in HEINE, BROOKE, *A worker justice reader*, 20.

²⁴⁴ *Compendium*, 313.

²⁴⁵ *Compendium*, 313 – 314.

effect, and not a cause, of previous alterations of labour conditions.²⁴⁶ In this way social teaching rejects a deterministic interpretation of the labour markets. It would mean, in other words, that behind the needs of today's labour market there is not an implicit force, but there are determinate choices of different economic and political actors involved in the process of regulating the labour markets. All actors, from the individual labourer to trade unions, from the small local employee to the CEO of the biggest multi-national corporation and all the public institutions, are involved in the process which gives to labour the shape it has. When such economic actors forget that the end of work is not profit itself, but the human-subject-worker, we experience the risk of having human beings exploited by others. Determinism is seen by social teaching as not sufficient in clearing up the reason behind current concrete situations. Generally speaking, such doctrines clash with the inner freedom of the will that human beings have according to RC theology. This freedom regards workers as well as all the other actors involved in the labour process.²⁴⁷

This is the point of view affirmed by social teaching:

*Given these impressive 'new things' in the world of work, the Church's social doctrine recommends first of all to avoid the error of insisting that the current changes take place in a deterministic manner. The decisive factor and 'referee' of this complex phase of change is once more the human person, who must remain the true protagonist of his work. He can and must take on in a creative and responsible fashion the present innovations and re-organizations, so that they lead to the growth of the person, the family, society and the entire human family (see *Laborem*, 10). Enlightenment for all can be found in the appeal of the subjective dimension of work, which according to the teaching of the Church's social doctrine must be given due priority, because human work 'proceeds directly from persons created in the image of God and called to prolong the work of creation by subduing the earth' (*Catechism*, 2427).²⁴⁸*

Social teaching looks for a deeper explication of the market processes related to labour. The *Compendium* sees that the human-subjective dimension of labour, namely the human beings, should be considered the relevant part in all the working process.

In this regard, Roman Catholic social thought interprets some recent criticism of neoclassical economic theories. Such a criticism is seen as attempting to detach from utilitarian positions the economic interpretation of life. To have a more humane economic development means to put the human being at the centre of the process, as the most important thing. In this way are interpreted the efforts of thinkers and economists like Amartya K. Sen, John Rawls and Joseph Stiglitz.²⁴⁹ Authors such as Sen propose a scientific outlook which combines ethics and economics, as well as suggest practicable paths for realizing a concrete social justice.²⁵⁰ Economists such

²⁴⁶ In fact the *Compendium* states that '[...] the changes in the labour market are often an effect of the change to which work has been subjected, and not one of its causes.' *Compendium*, 312.

²⁴⁷ See *Compendium*, 318.

²⁴⁸ *Compendium*, 317.

²⁴⁹ See G. SCANAGATTA A. PASETTO, *Sviluppo e bene comune. Per un'economia non separata dall'etica e per un'etica fondata sull'inviolabile dignità dell'uomo*. Città del Vaticano: Libreria Editrice Vaticana. 2012. 138.

²⁵⁰ See, for instance A. K. SEN, *The idea of justice*. London: Allen Lane, 2009; A. K. SEN,

as Stiglitz recognize the relevance of rethinking our mental categories regarding the market economy, financial institutions and the role of social relationships, not disregarding the theoretical help that comes from the study in the field of anthropological economics.²⁵¹ In the end, it seems that they are all guided by the necessity of repositioning the human being in the economic process. Or better, to reposition the economic process itself, and let it be a helpful tool in the progress of the whole humanity.

The big novelty among all the changes and developments that modernity has faced is the recent explosion of the globalization of production and consumption. This means also a globalization of work activity. This phenomenon presents some peculiar characteristics, which the *Compendium* tries to enlighten. For instance we see how in a multinational corporation, the ownership is nowadays usually detached from the place where the material productive chain is. That is a fact known as delocalization or outsourcing. This arrangement allows multi-national corporations to take the advantages of having their manufacturing process in a country where labour is usually cheaper. The reason why it is cheaper is usually due to the critical absence of labour rights, namely no, or very limited, taxes for social security. In this perspective, where the corporations only focus on their instant profits and forget about the contribution they could give to those countries in developing human rights and social securities, social thought proposes an enlargement of labour rights to a global scale parallel to the globalization of trade markets and companies:

*The phenomenon of globalization is one of the most important causes of the current change in the organization of work. This phenomenon brings about new forms of production where plants are located away from where strategies are decided and far from the markets where the goods are consumed. There are two primary factors driving this phenomenon: the extraordinary speed of communication [...], and the relative ease with which merchandise and people are transported from one part of the world to another. This entails a fundamental consequence for processes of production, as property is ever further removed and often indifferent to the social effects of the decisions made. On the other hand, if it is true that globalization is neither good nor bad in itself, but depends on how it is used (see JOHN PAUL II, *Address to the Pontifical Academy of Social Sciences*. 2, AAS 93, 2001. 599), it must be affirmed that a globalization of safeguards, minimum essential rights and equity is necessary.²⁵²*

Improvements in communication and transportation are seen as the two main causes of such economic globalization. Given the neutral character of globalization in the perspective of social teaching, some actors may exploit their position. In this sense goes the statement that a globalization of possibilities in trade, production and labour, should go parallel with a globalization of guarantees for everybody.

Development as freedom. Oxford: Oxford University Press, 1999; A. K. SEN *On ethics and economics*. Oxford: Blackwell Publishing, 1987, where the author, starting from the re-interpretation of Adam Smith's thought, argues about a re-definition of the relationship between ethics and economics involving a re-sizing of the too narrow traditional concept of self-interest.

²⁵¹ J. E. STIGLITZ, Preface, in K. POLANYI, *The great transformation. The political and economic origins of our time*. Boston: Beacon Press, 2001. viii – x; J. E. STIGLITZ, *The roaring Nineties. A new history of the world's most prosperous decade*. New York: W. W. Norton & Company, 2003. 281 – 319.

²⁵² *Compendium*, 310.

Concluding words

In this section I have tried to analyse the main points in social thought regarding today's labour. globalization remains an aspect that cannot be left apart in such a discourse. All questions must be addressed with the greatest awareness about the fact that we live in an epoch in which human issues are human exactly because they regard all of humanity, in this sense we speak of global issues.²⁵³ Roman Catholic Church's social teaching, in this context of increasing social risks and opportunities, asks for a correct interpretation of the position workers should have within the globalization process.²⁵⁴ We might conclude that social teaching while recognizing some major changes affecting the world of labour nowadays, claims that there are elements in the socio-economic perspective of labour that are still always more important than others. This regards the fact that workers are human beings, therefore their safety should be considered before any other economic reason of whatever developmental argument.

Paraphrasing these ideas, we can say that the RCC's vision of labour proposes a new anthropology of labour. This is parallel to the perspective outlined in a theology of labour that gives sense to the interpretation of labour as a unifying force in the world, in the sense that labour creates fraternity among human beings. Indeed, the theology of labour has been interpreted in this way by pope Paul VI.²⁵⁵ For its part, the anthropological perspective gives sense to all previous considerations because it maintains as crucial the fact that the worker is a human person.²⁵⁶ globalization is seen as a positive force when it could enhance solidarity and propensity to establish relationships that are themselves already present in human nature. globalization, especially regarding labour, is not considered by itself as absolutely good or bad, but it is interpreted as a phenomenon that, to a certain extent, brings the consequences of particular choices. That is why it requires to be handled and directed in the proper manner for having good results shared globally and not particularly. Indeed, the same perspective is adopted by Stiglitz who recognizes how in East-Asian countries globalization has brought huge improvements, while not bringing the same advantages in other parts of the world.²⁵⁷

We may observe now that the perspective that social doctrine brings forth, namely that people are to be considered part of the human family,²⁵⁸ has relevant reflections on the view in which these 'new things' are interpreted. globalization, and specifically the globalization of labour, is therefore not only a major trait of our epoch, that may pass away as time goes by. globalization is essentially an expression springing from understanding humanity as a family. globalization is the expression of that human condition that links together all human beings just because they are human beings in the same world. Human work is, in social thought, inscribed in this framework and it should be possible thus to extend to labour the possible positive consequences of a globalization of information, culture, and rights.

²⁵³ See A. GIDDENS, *Runaway world. How globalization is re-shaping our lives*. London: Profile Books, 1999. I.

²⁵⁴ See *Compendium*, 319, 321.

²⁵⁵ See *Populorum*, 27.

²⁵⁶ See *Compendium*, 322.

²⁵⁷ See J. E. STIGLITZ, *Globalization and its discontents*. New York: W. W. Norton & Company, 2002. 3 – 22.

²⁵⁸ See above IV, 5.

Part B

The social encyclical *Caritas in veritate*

Chapter VI – Benedict XVI’s theology and *Caritas in veritate*

1. Introduction

The previous part should have given to us some basic elements that regard the content and the context of the Roman Catholic social doctrine. The analysis we have made in the previous part, thus, represents the ground on which now we can start another kind of analysis.

From now on I will focus on Benedict XVI’s first social encyclical, *Caritas in Veritate*. This social encyclical, published in 2009, is the first after the publication of the *Compendium of the social doctrine of the Church*, and it is also the first social encyclical of the new Millennium. Moreover, this is the social encyclical that has as background one of the largest economic world’s crises, for which it might offer also some fruitful suggestions.²⁵⁹ These chronological facts alone make it an interesting document. *Caritas*, then, represents the most updated and hierarchically highest official document on social issues of the Roman Catholic Church.

My aim is to analyse the text as a contribution to a dialogue between religion and the socio-economic world. More specifically the analysis focuses on the message that a religious authority sends to the economic world. In doing this I will concentrate on those aspects of *Caritas* that closely refer to the socio-economic context. It is relevant to our purposes to investigate how this encyclical relates to previous social thought and whether there are new doctrinal elements introduced here. In the analysis of *Caritas* I will also consider some secular thinkers who have interest in the same topics, building thus a parallel view.

2. The theological framework of the encyclical letter *Caritas in veritate*

In introducing the analysis of *Caritas* we firstly may recapitulate what an encyclical is. An encyclical is a specific kind of document among the many that the pope of the Roman Catholic Church may use to address a wide spectrum of very different themes. ‘Encyclical letter’ etymologically means ‘circular’ letter.²⁶⁰ It comes from the Greek *ἐν κύκλῳ*, ‘circle’,²⁶¹ and refers to the fact that the letter goes, ‘circulates’, through the people to which is addressed: one might think of a letter from the pope that circulates among (and hence is read by) bishops and others. ‘Encyclical’ has

²⁵⁹ See J. M. BREEN, Love, truth and economy. A reflection on Benedict XVI’s *Caritas in veritate*, in *Harvard Journal of Law and Public Policy*, 33. 2010. 993.

²⁶⁰ See D. MELÉ, M. NAUGHTON, The encyclical-letter *Caritas in veritate*: ethical challenges for business, in *Journal of Business Ethics*, 100. 2011. 1.

²⁶¹ *Enciclopedia Cattolica*. Città del Vaticano: Ente per l’Enciclopedia Cattolica e per il Libro Cattolico 1951. Vol. VII.

become the designation for an official letter from the pope.²⁶² Such official documents have specific characteristics and particular historical traits. It could be helpful, then, to see what exactly is an encyclical letter in the context of the Roman Catholic Church:

A letter, ‘essentially pastoral in character’ (JOHN PAUL II, *Ut unum sint*. AAS 87, 1995. 921 - 982) written by the pope for the entire Church. Encyclicals have not been used for dogmatic definitions, but rather to give counsel or to shed light on points of doctrine that must be made more precise or that must be taught in view of specific circumstances.²⁶³

Thus, we are not going to find dogmas in the text of *Caritas*. There will be addressed mainly pastoral and social issues, with insights that are not purported to have an infallible character, but are offered with the authority that the pope might have in the eyes of believers and other readers. What is written in an encyclical such as a social encyclical, does not refer directly to the deposit of faith, namely to revelation. Hence, it leaves space for further developments as well as for corrections.²⁶⁴

The fact that such a document is written by the pope makes it nonetheless an important statement to be considered and not ignored by the members of the RCC:

Although Catholics are to give assent to the moral and doctrinal content of the papal encyclicals, three points must be kept in mind. First, encyclicals possess less authority than dogmatic pronouncements made by the extraordinary infallible magisterium (unless otherwise specifically provided). Second, they usually do not contain definitive, or infallible, teaching (unless otherwise clearly stated ...). Finally, the publication of an encyclical does not imply (unless otherwise provided) that the theological issues examined in the encyclical are now closed. An encyclical necessarily expresses a particular theological point of view, but it is usually not a definitive assessment.²⁶⁵

Social and economic reality changes. In order to be relevant, Roman Catholic social thought needs to share a certain dosage of flexibility with the shifts it encounters in the social and economic field.

We can argue that the choice of the form of an encyclical letter is due to the necessary evolutionary character of the social themes treated. Thus, *Caritas* addresses issues that due to their complexity are not supposed to be solved once and for all with this pronouncement. Nevertheless, the fact that an encyclical letter is an

²⁶² In fact: ‘In early times the word might be used of a letter sent out by any bishop, but in modern RC usage the term is restricted to such letters as are sent out worldwide by the Pope.’ F. L. CROSS, E. A. LIVINGSTONE, eds., *The Oxford Dictionary of the Christian Church*. New York: Oxford University Press, 1997.

²⁶³ *New Catholic Encyclopedia*, 2nd ed. Detroit: Thomson / Gale 2003. 205.

²⁶⁴ In this way the definition that: ‘The teaching contained in an encyclical has generally not been given as belonging formally to the deposit of revelation, but as Pius XII stated it pertains to Catholic doctrine: ‘In writing them, it is true, the popes do not exercise their teaching authority to the full. But such statements come under the day-to-day teaching of the Church. [...] an encyclical is generally considered to be an expression of the pope’s ordinary teaching authority; its contents are presumed to belong to the ordinary magisterium unless the opposite is clearly manifested. Because of this, the teaching of an encyclical is capable of being changed on specific points of detail (see PAUL VI, *Allocution*. AAS 56, 1964. 588)’ *New Catholic Encyclopedia*, 2nd ed. Detroit: Thomson / Gale 2003. 205.

²⁶⁵ *New Catholic Encyclopedia*, 2nd ed. Detroit: Thomson / Gale 2003. 205.

official document coming from the head of the RCC gives it a certain degree of owed respect for the believer who may reading it.

2.1. Caritas in veritate and Roman Catholic theology

Since the first introductory lines, *Caritas* appears to be strongly rooted in RC theological teaching. As it is a ‘social’ encyclical, the reader might expect a more political basis. If so, it would be a proper question to ask whether this Encyclical letter is founded on a more liberal or collectivist grounds, or whether it has more progressivist or conservative presuppositions. As it is a social encyclical with a focus on ethical, economical and environmental topics, such presuppositions may come easily. However, as I will show in the analysis of *Caritas* the main framework on which the Encyclical is built is Roman Catholic thought, theologically and ethically, and not a particular political philosophy.²⁶⁶

Moreover, *Caritas* is not a synthesis of various political philosophies, say of capitalism and socialism in the social doctrine. The declared scope of the Roman Catholic Church is in the intention that the RCC’s social and economic anthropology influence the socio-economic aspects of human life.

Roman Catholic social thought, here in the form of an encyclical letter, tries to establish a set of principles, like the co-operation between economics and ethics, that should be used as referential starting points for subsequent concrete policies. Then, it is also true that social thought comes to analyse, and sometimes to evaluate and interpret, specific aspects of different secular economic doctrines. If we consider the Roman Catholic Church as a voice in society among others, it might be of interest to see whether there is a concrete analysis in what it proposes, or whether there is at least some sort of convergence with the secular thought. Already it has been stated that the Roman Catholic Church as church does not have a particular competence regarding technical economic issues.²⁶⁷ Thus, it is not out of place²⁶⁸ to consider what exactly Benedict XVI, trained as a theologian and not as an economist, might say regarding for instance the contemporary economic and social crisis and whether that is helpful.

2.2. Caritas in veritate and Deus caritas est

Caritas in veritate, the encyclical about is not Benedict XVI’s first encyclical. *Caritas* comes after *Deus caritas est (Deus)*, the encyclical about Christian love, in 2006, and *Spe salvi*, the encyclical about Christian hope, in 2007. These three encyclicals show the intention of Benedict XVI to present his views on the three theological virtues, faith, hope and charity.²⁶⁹

²⁶⁶ See J. B. HEHIR, *Caritas in veritate* in broader context, in D. K. FINN, ed., *The Moral Dynamics of Economic Life: An Extension and Critique of Caritas in Veritate*. New York: Oxford University Press, 2012. 12 – 14.

²⁶⁷ See above I, 6. And below in this chapter 2.2.2.

²⁶⁸ See BREEN, Love, truth and economy, in *Har. J. of L. & P. Pol.*, 994.

²⁶⁹ See R. A. AMIRI, M. M. KEYS, Benedict XVI on liberal modernity’s need for ‘theological virtues’ of faith, hope, and love, in *Perspectives on Political Science*, 41. 1, 2012. 11 – 12.

Understanding what *caritas*, charity, means in *Deus caritas est* can give us helpful insights for understanding ‘charity’ in the theological perspective of Benedict XVI and in the text of *Caritas*.

After the premise that ‘love’ bears a semantic problem regarding the use and abuse of its meaning,²⁷⁰ in *Deus caritas est* the theme of love is firstly approached with the distinction between *eros* and *agape*.²⁷¹ These terms are treated with a brief philosophical overview, then with more specific biblical and exegetical references, and also with an eye to the contemporary social context. Drawing from this approach, Benedict XVI notices that *eros* regards the sphere of the human love and passion, and from this human ground is a love that ‘ascends’ towards the divine. It means that while *eros* maintains the reference to sexual love it also maintains the tie with the divine love.²⁷² Nevertheless, Benedict XVI notices how in today’s world there is the tendency to identify *eros* with practices that, in his opinion, do not regard true love, this same consideration appears also in *Caritas in veritate*.²⁷³ *Agape* is instead conceived as the ‘descending’ love that coming from God aims to pervade humanity.²⁷⁴ With the adherence to this love that comes from God the human being can better love in the sense of the Gospel, namely the human being can love the stranger, the unknown person, and even the enemy.²⁷⁵

Eros and *agape* are understood by Benedict XVI as the two faces of the divine love, the ‘ascending’ and ‘descending’ trajectories of love should meet to have a full realization of human love.²⁷⁶ And indeed one of Benedict XVI’s conclusions points out that we should speak about *eros* and *agape* using the category of the relation.²⁷⁷

The analysis and explanation of these two dimensions of love occupies the first part of *Deus caritas est*. In the second part of the encyclical Benedict XVI focuses on another aspect of love. It is here that love is treated as charity, and more specifically as the ‘service of charity’²⁷⁸ related to the material needs of people and interpreted as a duty of the Roman Catholic Church.

Justice, charity and the Roman Catholic Church

A basic distinction with ‘charity’ as treated in *Caritas in veritate* is that in *Deus caritas est* we see how the theme of charity is analysed in respect mainly to the material activities and the duties of the Roman Catholic Church. Indeed, it has been underlined how the theme of the Roman Catholic Church, and more specifically the

²⁷⁰ See BENEDICT XVI, *Deus caritas est*. Città del Vaticano: Libreria Editrice Vaticana, 2006. 2.

²⁷¹ See M. FARCI, *Ecclesia de caritate*. La chiesa ‘comunità d’amore’ nell’enciclica *Deus caritas est*, in *Rassegna di Teologia*, 1. 2013. 130.

²⁷² See MCDONAGH, *The unity of love*, in *Logos*, 23; F. GEORGE, *La Chiesa, l’amore di Dio che si fa visibile: una riflessione teologica sull’Enciclica*, in PONTIFICIO CONSIGLIO ‘COR UNUM’, *Deus caritas est. Atti del congresso mondiale sulla carità*. Città del Vaticano: Tipografia Vaticana, 2006. 101.

²⁷³ See the following 2.3.

²⁷⁴ See BENEDICT XVI, *Deus caritas est*, 5 – 6.

²⁷⁵ See BENEDICT XVI, *Deus caritas est*, 18; see FARCI, *Ecclesia de caritate*, in *Rass. di Teo.*, 129.

²⁷⁶ See L. A. ANAYA, *Giustizia e carità: i loro rapporti e i frutti morali per la vita del mondo*, in R. TREMBLAY, ed., *Deus caritas est. Per una teologia morale radicata in Cristo*. Città del Vaticano: Libreria Editrice Vaticana, 2007. 32.

²⁷⁷ See BENEDICT XVI, *Deus caritas est*, 5, 7; see FARCI, *Ecclesia de caritate*, in *Rass. di Teo.*, 130.

²⁷⁸ BENEDICT XVI, *Deus caritas est*, 19.

relationship love-RCC is in *Deus* very frequent and relevant.²⁷⁹ Instead, the text of *Caritas in veritate* prospects a wider understanding of the role of charity, for instance regarding other types of communities than the Roman Catholic Church, and for individuals in their own life. Notwithstanding this distinction some elements that come from *Deus* are relevant for our understanding of ‘charity’ in the thought of Benedict XVI.

In defining what charity means for the life of the RCC, Benedict XVI looks at the history of the first Christian communities as told in the Acts of the Apostles, according to which: ‘all who believed were together and had all things in common; and they sold their possessions and goods and distributed them to all, as any had need (Acts, 2: 44 – 45)’.²⁸⁰ Benedict XVI also acknowledges that

As the Church grew, this radical form of material communion could not in fact be preserved. But its essential core remained: within the community of believers there can never be room for a poverty that denies anyone what is needed for a dignified²⁸¹

Following this perspective, Benedict XVI proposes a sort of historical account of the charitable activity of the Roman Catholic Church, where he tries to confirm what said above. Namely that even if the radical status of the first community around the apostles has not lasted, nevertheless the Roman Catholic Church has witnessed with its charitable initiatives its presence in the world.²⁸²

Benedict XVI points out that one main aspect that regards the life of the RCC is the charitable love, the ‘*caritas-agape*’,²⁸³ that characterizes both the commitment to the charitable service towards who is ‘within’ the RCC, and also, in an universal way, for who is ‘beyond’ the RCC.²⁸⁴ In this sense, Benedict XVI considers love as the main trait of the RCC interpreted as a community of people that consequently can be considered a ‘community of love’.²⁸⁵

Benedict XVI acknowledges that there is some truth in the common objection moved to the Roman Catholic Church, especially from Marxist environments, for which the charitable activity is in itself a way for maintaining unjust structures in society as far as charity is a way for the rich to fulfil their moral obligation, while instead people should work for building a just society in which there would be no need for charity.²⁸⁶ Benedict XVI points out that since the formation of the modern state, and the Industrial Revolution changed the social structures, the pursue of a just society is a task of the state; it is a typical political duty. Moreover, the Roman Catholic ‘Church’s leadership was slow to realize that the issue of the just structuring of society needed to be approached in a new way’.²⁸⁷

²⁷⁹ See FARCI, *Ecclesia de caritate*, in *Rass. di Teo.*, 128.

²⁸⁰ BENEDICT XVI, *Deus caritas est*, 20.

²⁸¹ BENEDICT XVI, *Deus caritas est*, 20.

²⁸² See BENEDICT XVI, *Deus caritas est*, 22 – 25.

²⁸³ BENEDICT XVI, *Deus caritas est*, 25.

²⁸⁴ See BENEDICT XVI, *Deus caritas est*, 25.

²⁸⁵ See R. W. GARNETT, *Church, state and the practice of love*, in *Villanova Law Revue*, 52. 2007. 281, 291.

²⁸⁶ See BENEDICT XVI, *Deus caritas est*, 26.

²⁸⁷ BENEDICT XVI, *Deus caritas est*, 27.

Then, Benedict XVI's criticism towards Marxism is oriented to show how that objection that Marxism claims for the charitable activity in favour of the poor is itself dangerous because can make the human inhuman:

What we have here, though, is really an inhuman philosophy. People of the present are sacrificed to the *moloch* of the future - a future whose effective realization is at best doubtful. One does not make the world more human by refusing to act humanely here and now. We contribute to a better world only by personally doing good now, with full commitment and wherever we have the opportunity, independently of partisan strategies and programmes. The Christian's programme - the programme of the Good Samaritan, the programme of Jesus - is 'a heart which sees'. This heart sees where love is needed and acts accordingly. Obviously when charitable activity is carried out by the Church as a communitarian initiative, the spontaneity of individuals must be combined with planning, foresight and cooperation with other similar institutions.²⁸⁸

We can say that Benedict XVI even if recognizing some exactness in Marxist analysis of modern society,²⁸⁹ he decisively rejects what he sees as the Marxist objection about the useless character of charitable activity.

Then, Benedict XVI insists on the consideration that pursuing justice in society is a peculiar objective of the political sphere. It does not seem that he wants to exclude the RCC from the pursuing of justice in society, but he wants to re-affirm the responsibility of politics in building a just social order.

Moreover, it seems that the general tenor of *Deus* is to remind to the reader that the 'distinction between what belongs to Caesar and what belongs to God (see *Mt* 22:21), in other words, the distinction between Church and State',²⁹⁰ is in the opinion of Benedict XVI a distinction 'fundamental to Christianity'.²⁹¹ This separation not only regards the guarantee of a certain degree of religious freedom within the state, but also regards the freedom about the distinctiveness in the method and organization in which, for instance, is pursued social justice by a religious organization, in this case the RCC.²⁹²

That the Roman Catholic Church and the state are two separate entities is something of easy agreement. It might be also not impossible to agree on the fact that notwithstanding this separation '[t]he two spheres are [...] yet always interrelated'.²⁹³ But if, from one side Benedict XVI is very clear in pointing out that the Roman Catholic Church 'must not take the political battle to bring about the most just society possible',²⁹⁴ and that the RCC 'cannot and must not replace the State'.²⁹⁵ And from another side, Benedict XVI affirms that 'the promotion of justice through efforts to bring about openness of mind and will to the demands of the common good

²⁸⁸ BENEDICT XVI, *Deus caritas est*, 31.

²⁸⁹ See, for instance, BENEDICT XVI, *Spe salvi*. Città del Vaticano: Libreria Editrice Vaticana, 2007. 20.

²⁹⁰ BENEDICT XVI, *Deus caritas est*, 28.

²⁹¹ BENEDICT XVI, *Deus caritas est*, 28.

²⁹² See GARNETT, Church, state and the practice of love, in *Vill. L. Rev.*, 52. 288 – 290, 292 – 293, 301.

²⁹³ BENEDICT XVI, *Deus caritas est*, 28.

²⁹⁴ BENEDICT XVI, *Deus caritas est*, 28.

²⁹⁵ BENEDICT XVI, *Deus caritas est*, 28.

is something which concerns the Church deeply'.²⁹⁶ It remains a legitimate doubt about the effectiveness of this approach if the political involvement would remain excluded. These considerations may be perhaps clearer if we share the standpoint of who sees in the approach of Benedict XVI the attempt of making the Roman Catholic Church a smaller, more Gospel-inspired, autonomous and de-secularized institution,²⁹⁷ also for what regards its charitable activity. This perspective might be more in line with a radical separation that does not exclude co-operation between the Roman Catholic Church and the state.

It is probably the case that the view of Benedict XVI is more complex than what it may seem. The just state he has in mind is not the institution that aims to fulfil all the needs of its citizens, and that claims for it all the activities to promote justice in society. He rather prospects a state that, on the basis of the subsidiarity principle, leaves enough space for other institutions to operate with their charitable activities.²⁹⁸ This is because Benedict XVI is convinced that the state is not able to bring to the people the personal love and care that other forms of institutions or communities can realize. Benedict XVI is in the end convinced that '[l]ove – *caritas* – will always prove necessary, even in the most just society. There is no ordering of the State so just that it can eliminate the need for a service of love'.²⁹⁹ Benedict XVI sees charity as the unavoidable complement to justice, also because, as he points out in *Deus*, people need both 'material help' and 'care for their souls'.³⁰⁰ As we are going to see more precisely in the next section, there is a tight relation between justice and charity in the social theology of Benedict XVI.³⁰¹

Regarding the contemporary situation Benedict XVI underlines two aspects of the globalization process in relation to social justice and charity. First, he notices how through today's mean of communication is possible to know about the condition of material and spiritual poverty of other people. Then, he points out how today also distances are less relevant, thus allowing help and assistance in various forms also outside the national borders. It is in this context that the Roman Catholic Church, without losing its religious specificity, should work and operate in synergy both with the state and with other religious or non-religious associations and institutions.³⁰²

For the one who wants to operate close or within the Roman Catholic Church at the service of the poor, Benedict XVI proposes a sort of psychological analysis together with a spiritual advice. In the idea of Benedict XVI, Christ gives to the person acting at the service of the poor the awareness that what is doing is being done as a grace from God, and not as a manifestation of one's superiority towards another. In this direction are faced also all the limits that one may encounter in the charitable activity, and all the difficulties that can lead one to think that nothing will be enough for the needs of this or that poor, so that nothing can be concretely and

²⁹⁶ BENEDICT XVI, *Deus caritas est*, 28.

²⁹⁷ See GARNETT, Church, state and the practice of love, in *Vill. L. Rev.*, 52.297, 302.

²⁹⁸ See ANAYA, Giustizia e carità, in R. TREMBLAY, ed., *Deus caritas est*, 30, 35.

²⁹⁹ BENEDICT XVI, *Deus caritas est*, 28; see AMIRI, KEYS, Benedict XVI on liberal modernity's need for 'theological virtues', in *Persp. on Pol. Sc.*, 41.13.

³⁰⁰ BENEDICT XVI, *Deus caritas est*, 28; see GEORGE, La Chiesa, l'amore di Dio che si fa visibile, in PONTIFICIO CONSIGLIO 'COR UNUM', *Deus caritas est*, 103.

³⁰¹ See AMIRI, KEYS, Benedict XVI on liberal modernity's need for 'theological virtues', in *Persp. on Pol. Sc.*, 41. 15.

³⁰² See BENEDICT XVI, *Deus caritas est*, 29 – 30.

permanently done. In this perspective is faced also that idea that it is not only on the basis of our activity that we implement the Roman Catholic practice of charity, but together with the action must come love:

‘If I give away all I have, and if I deliver my body to be burned, but do not have love, I gain nothing’ (*1 Cor*: 13, 3). This hymn must be the *Magna Carta* of all ecclesial service; it sums up all the reflections on love which I have offered throughout this Encyclical Letter. Practical activity will always be insufficient, unless it visibly expresses a love for man, a love nourished by an encounter with Christ. My deep personal sharing in the needs and sufferings of others becomes a sharing of my very self with them: if my gift is not to prove a source of humiliation, I must give to others not only something that is my own, but my very self; I must be personally present in my gift.³⁰³

It is also in regard of considerations like these above quoted that Benedict XVI’s *Deus caritas est* has been defined as the answer ‘to a defined deficit [of love] in today’s market-driven culture.’³⁰⁴ We may summarize the point of Benedict XVI saying that charity goes with the person, and that no impersonal force or institution may be able to fill a gap of human love. The person, including both the lay believer and the person of good will, together with faith and hope bears within also the spiritual dimension. This is a love that becomes unavoidably ‘performative’, namely that from the inside of the individual aims to pervade the social reality.³⁰⁵

Benedict XVI sees all these reflections in the context of what he thinks is their natural source, namely the prayer. Prayer intended as the believer’s question towards a God that seems inactive in front of the world’s suffering and injustices.³⁰⁶ From Job to Saint Augustine³⁰⁷ the question about the presence of injustice seems to be without a concrete reasonable answer. For Benedict XVI is exactly in this particular possibility of asking that we have faith in a God that does not ignore us ‘even when his silence remains incomprehensible’,³⁰⁸ and from this awareness and this hope, the believer can witness God’s love through the charitable activity.

2.3. Two main themes of Caritas in veritate: charity and truth

We start now with the clarification of the main words in the title of the encyclical *Caritas in veritate*, namely: *caritas* and *veritate*, or in translation, *charity* and *truth*. As keywords of the title they might provide an instant general description of *Caritas in veritate*.

Benedict XVI states that charity is the main element in the Roman Catholic Church’s social teaching. Love, here a synonym of charity, is the source of social teaching, from which the desire for a more just society arises. There is no Roman

³⁰³ BENEDICT XVI, *Deus caritas est*, 34.

³⁰⁴ P. McDONAGH, The unity of love: reflections on the first encyclical of pope Benedict XVI, in *Logos: a Journal of Catholic Thought and Culture*, 10. 1, 2007. 20.

³⁰⁵ See AMIRI, KEYS, Benedict XVI on liberal modernity’s need for ‘theological virtues’, in *Persp. on Pol. Sc.*, 41. 15; ANAYA, Giustizia e carità, in R. TREMBLAY, ed., *Deus caritas est*, 34.

³⁰⁶ See BENEDICT XVI, *Deus caritas est*, 38.

³⁰⁷ See BENEDICT XVI, *Deus caritas est*, 38.

³⁰⁸ BENEDICT XVI, *Deus caritas est*, 38.

Catholic social thought if at its beginning there is not love. This force is the primal mover of the RCC's social teaching. Upon this view, love is also the end that the social doctrine pursues through the common good:

Charity is at the heart of the Church's social doctrine. Every responsibility and every commitment spelt out by that doctrine is derived from charity which, according to the teaching of Jesus, is the synthesis of the entire Law (see *Mt 22*, 36 - 40). [...] it is the principle not only of micro-relationships (with friends, with family members or within small groups) but also of macro-relationships (social, economic and political ones).³⁰⁹

According to this interpretation, the supreme law of the Gospel is the law of charity, the law of love to be given and received. This should happen also in the relationships among institutions and social agents at the political and economic level, and not only among individual private persons. The text seems to prospect a certain complementarity between the two, as these two levels have their meaningful source always in charity.

In a subsequent part, Benedict XVI is more precise in defining what charity means. While referring to its etymology he relates love among human beings to the love God first has given to the world, such an approach appears in line with the content of *Deus caritas est*.³¹⁰ It should be noticed here how Benedict XVI's theology interprets God as the source of love. This love is then reflected among people, and people are considered as instruments in building 'networks of charity'. In such view the social doctrine of the RCC is seen as a theoretical manifestation of that love.

Thus, love and respect among humans is the continuation of the primary love of God. According to Benedict XVI's words, without God's love in the first place, we could not experience love among us. Therefore each time we ignore or forget that initial love comes from God we fail to realize charity among us:

Charity is love received and given. It is 'grace' (*cháris*). Its source is the wellspring of the Father's love for the Son, in the Holy Spirit. [...] As the objects of God's love, men and women become subjects of charity, they are called to make themselves instruments of grace, so as to pour forth God's charity and to weave networks of charity. This dynamic of charity received and given is what gives rise to the Church's social teaching, which is *caritas in veritate in re sociali*: the proclamation of the truth of Christ's love in society. This doctrine is a service to charity, but its locus is truth. [...] It is at the same time the truth of faith and of reason, both in the distinction and also in the convergence of those two cognitive fields.³¹¹

Benedict XVI says that in modern times there is a process of emptying that affects the word charity and its synonyms, including love. In his view, love's content and meaning is filled up with things that have nothing to do with love's deep significance.³¹² It is in this concern about the meaning of the word love that lays, in

³⁰⁹ *Caritas*, 2.

³¹⁰ See BENEDICT XVI, *Deus caritas est*, 16 – 18; and above 2.2.

³¹¹ *Caritas*, 5.

³¹² See *Caritas*, 3.

his theology, the exigency to tie charity with truth.³¹³ Charity is the force that bonds together all that is social, but only if this charity is ‘in truth’, of the true kind. That is why it would be not enough, in the theology of this pope, to say *caritas in re sociali*, but he needs to point to *caritas in veritate in re sociali*. If we interpret love at a social level, which means once again that we are not speaking about love in a sentimental or romantic way, it means that we are speaking about love as the main and principal force that leads human beings to pursue fairness in society. In this perspective love becomes a social fact that should pervade all actions that involve social consequences. As God made humans, in his socio-theological view, love is relevant also at the socio-economic level.

In fact, Benedict XVI develops his social thought starting from the assumption that when charity is alone its meaning and purposes can be lost and its practical content reduced. Instead, with truth, charity fully agrees with what is stated in the RC social thought. Thus, charity represents both human and divine love, and truth represents the place of this love, that is the Christian religion.³¹⁴

So, why is truth fundamental to charity? Why is it so unavoidable? According to *Caritas*, to love without truth, to love without God, is something impossible, and to understand charity in truth is something essential for building a good society. *Caritas*, is the love given and received, and *veritate* indicates the presence of God in guiding human efforts. Here it is the demand of closely bonding our acts of love with their proper supposed meaning. ‘Charity in truth’ is identified as the core principle from which grows the entire theology of Roman Catholic social teaching.

Following *Caritas*’s reasoning, when through the Christian faith in Jesus we apply his charitable love to our living-in-the-world, we are applying the highest truth and most reliable source of love towards the realization of God’s will. Benedict XVI sees ‘charity in truth’ as the highest unavoidable moral compass. In this way, he makes of *caritas in veritate* a principle, in the etymological sense of *principia*, because it is at the beginning of any action that is supposed to be rooted in the social thought of the Roman Catholic Church. In the specific context of today’s world in which the social doctrine is inscribed, Benedict XVI identifies the moral results that we should see when social thought is truly realized, when charity in truth is put into practice. The result has the shape of two moral criteria, justice and the common good:

‘*Caritas in veritate*’ is the principle around which the Church’s social doctrine turns, a principle that takes on practical form in the criteria that govern moral action. I would like to consider two of these in particular, of special relevance to the commitment to development in an increasingly globalized society: *justice and the common good*.³¹⁵

Therefore, justice and the common good, which we are going to examine more in detail, are two practical consequences of the actions taken at the social level when the inspiring principle is ‘charity in truth’. It means that for Benedict XVI to define the content of a moral action according to social thought would mean to read it within the meaning of charity in truth.

³¹³ See BREEN, Love, truth and economy, in *Har. J. of L. & P. Pol.*, 1004 – 1005.

³¹⁴ See MELÉ, NAUGHTON, The encyclical-letter *Caritas in veritate*, in *J. of Bus. Ethics*, 3.

³¹⁵ *Caritas*, 6.

All the efforts to explain what ‘charity in truth’ means, find, then, practical application in the moral order. In the end, charity in truth should represent the criteria for the social action of individuals or institutions.

2.3.1. *Justice*

According to Benedict XVI, charity is love given for free, ‘charity is love received and given’, as seen above. It represents a way of giving characterized as a gift from the spirit; gratuity is its economic translation. This means that charity, love, is considered the source of giving for free, gratuity.

Starting from this simple advice, Benedict XVI observes the conditions for such charity to flourish in society, and he states that in any social environment the first condition for the existence of charity is justice. In a society in which justice is lacking, giving for free becomes almost impossible. What exactly does this mean?

First of all, as a premise, we have to take into account that in Benedict XVI’s theological perspective, charity and justice are interwoven and, much more, they cannot be divided. More precisely, justice represents what is due, by the fact of being human, to all human beings. And charity represents what can be freely and gratuitously given in addition to that. Thus, when something ‘due’, ‘owed’ is given, we are acting closer to the criteria of justice.³¹⁶ When we give something more than what is due, we are acting closer to the criteria of charity. In this sense, Benedict XVI points out that if someone is lacking elementary and essential things in life, starting from sufficient nourishment and peaceful living, it is impossible to offer him something more, or something different. That is where we see that charity and justice interrelated.

It is at this point that Benedict XVI claims that the relationships among humans are not exclusively made on the basis of rights and duties.³¹⁷ Once the duties of justice would have been accomplished, then there is the space for gratuity to build social relations.

When the criteria of justice have been fulfilled, there is a surplus of charitable free-giving which overwhelms the dutiful giving. While exceeding justice, charity represents its final objective. The end of justice is *caritas*, but justice is the ground for charity. We may also say, in other words, that in Benedict XVI’s vision justice is the unavoidable presupposition for loving, it is its pre-constitutive part, but then charity is the end for which justice is practised:

First of all, justice. *Ubi societas, ibi ius*: every society draws up its own system of justice. *Charity goes beyond justice*, because to love is to give, to offer what is ‘mine’ to the other; but it never lacks justice, which prompts us to give the other what is ‘his’, what is due to him by reason of his being or his acting. I cannot ‘give’ what is mine to the other, without first giving him what pertains to him in justice. If we love others with charity, then first of all we are just towards them. Not only is justice not extraneous to charity, not only is it not an alternative or parallel path to charity: justice is inseparable from charity (see *Populorum*, 22; *Gaudium*, 69), and intrinsic to it.³¹⁸

³¹⁶ See BREEN, Love, truth and economy, in *Har. J. of L. & P. Pol.*, 1007 – 1008.

³¹⁷ *Caritas*, 6.

³¹⁸ *Caritas*, 6.

The relationship between justice and charity in Benedict XVI's eyes is a tight one. And this tightness might give us also the elements for understanding the foundations of a theory of social justice as proposed in *Caritas*.

Justice is seen as interwoven to charity. Indeed, in his view justice contains in its essence 'what is due' to a human being, therefore it is a way for loving the human being. Justice is the necessary premise for loving, for an act with charitable intentions in any sense. Only after justice is put into practice, Benedict XVI suggests, can we start to implement charity.

It is possible to see a circularity in Benedict XVI's discourse because the source that pushes human beings to realize a just society is the love they share for each other. Benedict XVI brings forth the argument that justice is intrinsic to the social order, in the sense that any social group develops a system of justice. This reflects also the general idea of justice, as something 'owed', that has been developed in the Western countries.³¹⁹

Nevertheless, more closely to the perspective of Benedict XVI, justice and charity have to work together, they cannot be divided. He sees the act of love towards the other as never lacking justice, because when charity is in action it already presupposes an amount of justice that has been previously fulfilled.

This unifying view allows Benedict XVI to distinguish between what belongs to 'us' and what does not. Charity and justice, in his view, cannot be separated, they are interwoven, but they have different tasks. From one side, charity surpasses justice, because love is always more than what is due. But on the other side, justice is the basic presupposition for speaking of any sort of charitable love, because there cannot be any love where it lacks what is due for justice. We can say that they fulfil each other.

Benedict XVI sees that justice and charity are inseparable because in striving for the realization of a just society there is already *in nuce* the seed of love. He also stresses that justice is the essential element for a society to grow. Justice it is not only the main characteristic of that form of human aggregation that we call society, but it's the terrain in which charity then can exist.

2.3.2. *The common good and the city of God*

What does it mean to speak about the common good in relation to the charity in truth principle? Benedict XVI aims to show how the common good represents our main goal when we apply charity in truth to our social life. Indeed, he distinguishes an individual's good from the person's environment. This latter sort of good, which is common and shared, results from its use and preservation by all social subjects, both individuals and institutions. The realization of the common good calls for care for our closest neighbours and, at the same time, for implementing all sorts of institutions necessary for better pursuing this objective. Benedict XVI identifies this never-ending work of private citizens alongside institutions in the context of the city or *pólis*. Thus, according to this view, Christians and all the people of good will are called to assume a perspective in which the city is the preferred, even if not the unique, local starting point from which to build a path of charity that leads to the common good.³²⁰

³¹⁹ See BREEN, Love, truth and economy, in *Har. J. of L. & P. Pol.*, 1007.

³²⁰ A. J. G. SISON, J. FONTRODONA, The common good of business: addressing a challenge posed by

The path towards the common good goes through the community level to which the city belongs, with the solidarity that the community needs to exist. Therefore, as we have seen before,³²¹ working for the common good is put on two main levels, one is mainly institutional, and the other more private and relatively personal:

To desire the *common good* and strive towards it *is a requirement of justice and charity*. To take a stand for the common good is on the one hand to be solicitous for, and on the other hand to avail oneself of, that complex of institutions that give structure to the life of society, juridically, civilly, politically and culturally, making it the *pólis*, or ‘city’. [...] The more we strive to secure a common good corresponding to the real needs of our neighbours, the more effectively we love them. Every Christian is called to practise this charity, in a manner corresponding to his vocation and according to the degree of influence he wields in the *pólis*. This is the institutional path - we might also call it the political path - of charity, no less excellent and effective than the kind of charity which encounters the neighbour directly, outside the institutional mediation of the *pólis*.³²²

Being part of a community, Benedict XVI tells us, means to be part of a polis. The social dimension of a polis corresponds to the ideal place in which the Christian can be effective in contributing to the common good at the institutional level. As another element in approaching Benedict XVI’s social theory, it is interesting to notice here the direct reference to the institutional dimension of the ‘city’. The city is understood upon the definition of the Greek polis, and seen as the ideal place for creating the local common good.

In this view the earthly polis, the human city, is on its way to be transformed into the *city of God*. Not by coincidence is proposed Saint Augustine’s theology and his *City of God*. Benedict XVI’s theology has a deep source in the Augustinian tradition.³²³ His doctoral dissertation was titled *The People and the House of God in Augustine’s Doctrine of the Church*. It is true that any human city has a specific form and history. The city of God may signify the end we pursue in what today we could call the global city, given by the material shape that the fraternal character of human beings should take.

Thus, without a doubt we build human cities, but when we act towards the common good supported by charity in truth, even our local actions as ‘citizens’ are a valuable and substantial contribution to what will be the city of God. This city, of course calls for a transcendental concept of the urban agglomeration we may have in mind. And this implies an attitude directed towards a sort of divine citizenship. In this same view, it may also represent the consequence of letting our perception of citizenship be extended to a global scale. To be interdependent makes us citizens of the world, global citizens indeed. It would mean to envision a worldly city in which there are no barriers:

‘*Caritas in Veritate*’, in *Journal of Business Ethics*, 100. 2011. 103 – 105.

³²¹ See above IV, 3.

³²² *Caritas*, 7.

³²³ See also AMIRI, KEYS, Benedict XVI on liberal modernity’s need for ‘theological virtues’, in *Persp. on Pol. Sc.*, 41. 12.

Man's earthly activity, when inspired and sustained by charity, contributes to the building of the universal *city of God*, which is the goal of the history of the human family. In an increasingly globalized society, the common good and the effort to obtain it cannot fail to assume the dimensions of the whole human family, that is to say, the community of peoples and nations (see *Pacem*, AAS 55, 268 - 270), in such a way as to shape the *earthly city* in unity and peace, rendering it to some degree an anticipation and a prefiguration of the undivided *city of God*.³²⁴

It seems that a concrete material expression of such a widely shared sense of common belonging and participation can be found in the socio-economic global perspective that we are experiencing today. Thanks primarily to technological developments, we are part of a world citizenship and we are aware of it. It happens that by using means of communication and exchanging goods and services we might become more aware of our being humans in the fraternal sense proposed, for instance, in the social teaching of the *Compendium*.³²⁵ This might also represent one of the highest opportunities concerning the modern process of globalization.

Nevertheless, the same processes have also risks related to the spreading of de-humanizing cultures, as social thought would call them. De-humanizing would mean to go against the definition of a human being as given in social teaching. There is the risk of globalizing de-humanization. The reasoning goes like this: when we agree that shared wealth is a desired objective, so that we may consider it an ultimate end, we should also be aware that such an end is not merely reached by technological progress alone. To be achieved, it needs the co-operation of every single human being in a potential position of doing it.

Implicitly, Benedict XVI points out that defining the improvement in the people's condition exclusively on the basis of technical data can compromise the effects and the contribution of the people. In this direction points also the work of Martha Nussbaum, for whom not uniquely the technical data referring to growth production should be taken into account for evaluating the general progress of a community.³²⁶ In regards of the new approaches that are nowadays coming out³²⁷ it is worthy to notice the contribution of three key figures of contemporary economics, Joseph Stiglitz, Amartya Sen and Jean-Paul Fitoussi, for which there is the need to re-think our usual technical parameter of evaluation:

In an increasingly performance-oriented society, metrics matter. What we measure affects what we do. [...] In the quest to increase GDP, we may end up with a society in which citizens are worse off. [...] A developing country that sells a polluting mining concession with low royalties and inadequate environmental regulation may see GDP increase but well-being decrease.³²⁸

³²⁴ *Caritas* 7.

³²⁵ See *Compendium*, 390, and above IV, 5.

³²⁶ See on this M. C. NUSSBAUM, *Creating capabilities. The human development approach*. London: Belknap Press, Harvard University Press, 2011.

³²⁷ See also P. H. DEMBINSKI, The incompleteness of the economy and business: a forceful reminder, in *Journal of Business Ethics*, 100. 2011. 32 – 33.

³²⁸ J. E. STIGLITZ, A. K. SEN, J-P. FITOUSSI, *Mismeasuring our lives. Why GDP doesn't add up*. New York: The New Press, 2010. xvii, xxii.

The Roman Catholic Church, in this context, does not propose a specific set of measures or an economic and social technical solution ready to apply. It intends to fulfil its duty by preserving for humanity core principles coming from the interpretation of Jesus' revelation.³²⁹ The message of the social doctrine, and here specifically of *Caritas*, can be considered a message to the individual heart and souls, and not a message that lists specific policy measures. The message of social teaching aims to reach first of all people's consciences. One of the actual messages of *Caritas* regards a re-evaluation of our technical standards in measuring socio-economic progresses:

Love in truth - *caritas in veritate* - is a great challenge for the Church in a world that is becoming progressively and pervasively globalized. The risk for our time is that the *de facto* interdependence of people and nations is not matched by ethical interaction of consciences and minds that would give rise to truly human development. Only in *charity, illumined by the light of reason and faith*, is it possible to pursue development goals that possess a more humane and humanizing value. The sharing of goods and resources, from which authentic development proceeds, is not guaranteed by merely technical progress and relationships of utility, but by the potential of love that overcomes evil with good (see *Rom* 12, 21), opening up the path towards reciprocity of consciences and liberties.³³⁰

Benedict XVI points out that one of the main ends of RC social doctrine, namely the co-division of wealth and resources, is something that needs more than technological advancements. To reach such an end, people should rely upon the fraternal love to which all the human beings can contribute. His position holds that we cannot have the guarantee that our progress will automatically lead to a better world if our intention is not exactly this. From here comes the warning of the social doctrine, not to leave the decisions about our future uniquely to strictly technical economic indicators. In this sense the message can be interpreted also as a call for the humanization of development.

To love the other in this interdependent world would mean then to promote institutions able to do that; it would mean to have the intention of directing technological advancement on the path that leads to the common good. This can be translated in the guarantee of certain rights, duties and freedoms for everyone, as clarified by Amartya Sen.³³¹

From the analysis of the meaning of the words charity and truth, their relationships, and their explication through the realization of the common good, we should have a concrete framework in which it should be possible the reflection on the social theorization presented in *Caritas*.

³²⁹ Benedict XVI refers to the previous social teaching when he states that: 'The Church does not have technical solutions to offer (see *Gaudium*, 36; *Octogesima*, 4; *Centesimus*, 43) and does not claim 'to interfere in any way in the politics of States' (*Populorum*, 13) She does, however, have a mission of truth to accomplish, in every time and circumstance, for a society that is attuned to man, to his dignity, to his vocation.' *Caritas*, 9.

³³⁰ *Caritas*, 9.

³³¹ See A. K. SEN, *Development as freedom*. Oxford: Oxford University Press, 1999. 152 – 159.

2.4. *Liberation and love.*

Before moving on in our analysis in the main text of *Caritas*, I take the occasion to look at the position of Benedict XVI towards the theology of liberation. The discourse about justice, love and the common good that we have seen above is related to our concern here.

In a discourse about justice, love and the common good, then, it is not improper to consider liberation theology. ‘Liberation theology’ is the name given to a movement that sought to address poverty and injustice, most clearly present since the 1960s in Latin America. Most liberation theologians were Roman Catholic. Their discourse about justice is about social justice, which addresses the ‘option for the poor’, that is the central theme in the theology of liberation.³³² Here, we are interested in understanding if and how the perspectives of *Caritas* are dealing with this legitimate instance.

It has been pointed out how some theologians of liberation have, in the end, identified *justice* and *love*.³³³ The teaching of Benedict XVI calls for understanding that there is a distinction and an interrelation between justice and charity. In this sense, *Caritas* presents a different view from the liberation theologians.³³⁴ The two, justice and charity, are not the same thing, but still they need each other. As we have already seen, justice alone is not enough for building the worldly fraternal human society as outlined by the Roman Catholic social teaching and *Caritas*. For doing this, love is needed. But love can only come when justice is fulfilled.

Thus we also see here the central role of charity in the social teaching of Benedict XVI. If we look to how Benedict XVI intends the relationship between *charity* and *justice* we can see that he presupposes justice before charity. Nevertheless he sees that the ultimate end of justice is charity. In this sense justice is intrinsic to charity.³³⁵ Here we can find a difference between Benedict XVI’s approach to justice and charity and that of a representative line of the liberation theology. This being said, we may consider more concrete issues that have caused tensions among the Roman Catholic hierarchy since the appearance of the liberation theology.

The tensions between the leadership of the Roman Catholic Church and representatives of the theology of liberation is mainly based on ‘certain forms’ of liberation theology, mainly because they were considered to adhere too much to Marxism.³³⁶ According to Vatican officials these theologies needed to avoid those Marxist elements.³³⁷ The most relevant official documents of the RCC are the *Instruction on certain aspects of the liberation theology*, also known as *Libertatis nuntius*, of 1984, and the following *Instruction on Christian freedom and liberation*,

³³² See G. GUTIÉRREZ, Looking forward, in G. GUTIÉRREZ, *A theology of liberation*. Maryknoll, NY: Orbis Books, 2000. xx – xxi.

³³³ John Breen about Gustavo Gutiérrez, see BREEN, Love, truth and economy, in *Har. J. of L. & P. Pol.*, 1006.

³³⁴ See BREEN, Love, truth and economy, in *Har. J. of L. & P. Pol.*, 1006.

³³⁵ See BREEN, Love, truth and economy, in *Har. J. of L. & P. Pol.*, 1008.

³³⁶ D. TURNER, Marxism, liberation theology and the way of negation, in C. ROWLAND, ed., *The Cambridge companion to liberation theology*. Cambridge: Cambridge University Press, 1999. 199 – 200.

³³⁷ P. HEBBLETHWAITE, Liberation theology and the Roman Catholic Church, in ROWLAND, *The Cambridge companion to liberation theology*, 195.

known as *Libertatis conscientia*, of 1986. Both came from the Congregation for the Doctrine of the Faith, which at that time had cardinal Joseph Ratzinger as its Prefect. The latter document especially, instead of focussing on what needs correction in liberation theologies, speaks openly about what is accepted.³³⁸ Regarding this second document Dorr points out how even if certain teachings of the liberation theology were finally accepted, these documents did not show any enthusiasm for such a theology. Dorr also underlines how the Vatican continued systematically to appoint ‘Church leaders who were quite unsympathetic to such an approach’.³³⁹

In *Libertatis nuntius* only ‘certain aspects’ of liberation theology were rejected, thus one should be careful in identifying this with a total rejection of the ideas of liberation theology and its aims as such. It has been pointed out how that was a ‘warning’ and not a ‘condemnation’.³⁴⁰ The vocabulary of the theology of liberation, including the ‘option for the poor’, has entered the social teaching of the Roman Catholic Church since the Latin American Episcopal Conferences in Medellín, Colombia, in 1968, and in Puebla, Mexico, in 1979.³⁴¹ *Medellin* and *Puebla* are, in one way or another, representative of an atmosphere of dialogue. Also subsequent reflections emphasize the plurality of the theological discourse as alive and present.³⁴²

We go now closer to see where Benedict XVI stands regarding the option for the poor. When Ratzinger was still Prefect of the Congregation for the Doctrine of the Faith, in 1985, a book about liberation theology was published with his foreword. Here it is clearly stated that the controversy with some *theologians* of liberation, does not mean a contrast with the most inner intention of liberation *theology* as such. And it is also emphasized that the main problematic issue with liberation theology regards the possible ‘degenerations’ that the too firm adherence with Marxism might bring.³⁴³

More recently, then, Dorr has pointed out how Benedict XVI accepted the terminology of a ‘preferential option for the poor’, though Dorr also notices that Benedict XVI when accepting this terminology does not accept its source, namely liberation theology.³⁴⁴ Dorr argues that Benedict XVI does not link the option for the poor with a ‘clear choice to be on the side of those who resist oppression and who are willing not only to struggle for justice but to do so by engaging in sharp contestation with those who oppress them. There is no trace that Benedict himself experiences such contestation and struggle as intrinsic to his own spirituality’.³⁴⁵ Indeed, the

³³⁸ See D. DORR, *Option for the poor and for the earth. Catholic social teaching*. Maryknoll, NY: Orbis Books, 2012. 289.

³³⁹ DORR, *Option for the poor and for the earth*, 290.

³⁴⁰ HEBBLETHWAITE, Liberation theology and the Roman Catholic Church, in *The Cambridge companion to liberation theology*, 190.

³⁴¹ See DORR, *Option for the poor and for the earth*, 181; G. GUTIÉRREZ, The task and content of liberation theology, in ROWLAND, *The Cambridge companion to liberation theology*, 26 – 27; GUTIÉRREZ, Looking forward, in GUTIÉRREZ, *A theology of liberation*, xxvi – xxvii.

³⁴² See, for instance, CONSEJO EPISCOPAL LATINOAMERICANO, *El futuro de la reflexión teológica en América Latina*. Santafé de Bogotá D. C., 1996.

³⁴³ See J. RATZINGER, Presentazione, in SACRA CONGREGAZIONE PER LA DOTTRINA DELLA FEDE, *Teologia della liberazione*. Roma: Edizioni Logos, 1985. 5 – 7.

³⁴⁴ See DORR, *Option for the poor and for the earth*, 388.

³⁴⁵ DORR, *Option for the poor and for the earth*, 387 – 388. See also C. RUDDY, No restorationist.

social teaching of Benedict XVI can be seen as focussing more on the call for the responsible role of who is 'not poor':

While the poor of the world continue knocking on the doors of the rich, the world of affluence runs the risk of no longer hearing those knocks, on account of a conscience that can no longer distinguish what is human.³⁴⁶

In this regard we can say that Benedict XVI is not ignoring the condition of the poor of the world. At the same time, there is a major difference in approach to the condition of the poor in the world, there is a difference in approaching the same problem.

The option for the poor is the main concern of the theology of liberation. Liberation theology calls for a responsible awareness of the poor of the world and encourage people to strive to reach social justice.³⁴⁷ Benedict XVI insists more on responsible action of those we may call the 'rich of the world'. These people, living in the 'affluent society', are supposed to answer the questions of the poor. Among those living in these affluent societies the attention of Benedict XVI seems more directed towards the lay people than towards the clergy.³⁴⁸ What also characterizes these people living in rich countries, in Benedict XVI's perspective, is the risk of not discerning anymore what is human, and thus not hearing a human call at all.

We can conclude this brief account on *Caritas* and liberation theology saying that the social teaching of Benedict XVI does not seem to share the *option* for the poor as usually intended in the context of liberation theology. We agree with Dorr's analysis in pointing that for Benedict XVI 'it is more a matter of having a *concern* for the poor, linked to a deep and well-grounded commitment to justice in the world.'³⁴⁹ Notwithstanding this distinction we may argue that there are signs that the Vatican today is somehow more sympathetic towards the liberation theology. On 1st July 2012 Benedict XVI appointed Gerhard Ludwig Müller as Prefect of the Congregation for the Doctrine of the Faith. It is true that this German priest is seen as a conservative one by the most liberal wings of the Roman Catholic Church,³⁵⁰ but this choice for the Congregation caused also concern among the most conservative parts of the Roman Catholic Church. Not only is Müller a pupil of Gustavo Gutiérrez, but he also wrote a book with him in 2004, *An der Seite der Armen. Theologie der Befreiung (On the side of the poor. Theology of liberation)*.³⁵¹ Moreover, in 2008, at the Pontifical Catholic University of Peru, Lima, Müller gave a speech where he stated that 'the theology of Gustavo Gutiérrez, independently of how you look at it, is orthodox because it is orthopractic and it teaches us the correct

Ratzinger's theological journey, in *Commonweal*, 132. 11. 2005. 18.

³⁴⁶ *Caritas*, 75.

³⁴⁷ See GUTIÉRREZ, Looking forward, in GUTIÉRREZ, *A theology of liberation*, xxi; DORR, *Option for the poor and for the earth*, 388.

³⁴⁸ See DORR, *Option for the poor and for the earth*, 445 – 446.

³⁴⁹ DORR, *Option for the poor and for the earth*, 389.

³⁵⁰ See A. BELTRAMO, A liberation theologian in the Holy Office?, in *Vatican Insider*, October 2001. Available online at <http://vaticaninsider.lastampa.it/en/the-vatican/detail/articolo/america-latina-latin-america-papa-el-papa-pope-congregazione-per-la-dottrina-della-fede-congre>

³⁵¹ G. GUTIÉRREZ, G. L. MÜLLER, *An der Seite der Armen. Theologie der Befreiung*. Sankt Ulrich Verlag, Augsburg 2004.

way of acting in a Christian fashion since it comes from true faith.³⁵² How to consider this appointment? We agree with Charles Taylor that ‘it is one thing to offer doctrinal and theoretical solutions and evaluations as a cardinal, another to decide matters as a pope’.³⁵³ Thus, ‘pope’ Benedict XVI assumes a different and broader perspective on the complexity of the Roman Catholic Church’s life, than ‘cardinal’ Joseph Ratzinger. This being said, one might argue that an explicit openness to liberation theology might call for an appointment in a relevant role of, for instance, a South American bishop. Moreover, in the social thought of Benedict XVI the emphasis on the person’s individual contribution to the common good and on person’s transcendence, we notice an approach to social justice influenced by the tradition of personalism³⁵⁴ that can be considered as his attempt to propose an alternative approach to some collectivist and materialist temptations. Nonetheless, given the appointment of Müller we may foresee for the future the opportunity for a prolific, and somehow unexpected, dialogue between the Roman Catholic hierarchy and liberation theologians.

3. *Populorum progressio and the legacy of Vatican II*

This section specifically treats the influence exerted by Paul VI’s social encyclical *Populorum progressio* (*Populorum*) on Benedict XVI’s *Caritas*, and thereby provides a partial answer to questions regarding connections between *Caritas* and previous social teaching. Moreover, *Caritas* (2009) is thought to celebrate the fortieth year since the publishing of *Populorum* (1976). The publication of *Caritas* had been delayed also due to the grave economic conditions that since 2007 affected the world economy, and especially the Western countries.³⁵⁵

In *Caritas* the approach to certain topics appears to have been influenced by Paul VI’s encyclical. Confirmation of this can be found having a look to *Caritas*’ titles, where the term ‘development’ is largely present. *Populorum*’s subtitle says that it is an *encyclical letter on the development of people*.³⁵⁶ Benedict XVI expressly calls *Populorum* an inspiration for his work. Here, the theological inspiration behind *Populorum* will be traced, clarifying why that text must be considered even forty years after its publication.

Benedict XVI declares without hesitation that when we read *Populorum* we are reading the *Rerum novarum* of contemporary times. This huge relevance given to *Populorum* is due to the accurate understanding of society and of its problems that Paul VI made at that time.³⁵⁷ Moreover, when we consider where

³⁵² BELTRAMO, *A liberation theologian in the Holy Office?*, in *Vatican Insider*.

³⁵³ C. TAYLOR, Benedict XVI, in *Public Culture*, 18, 1. Duke University Press, 2006. 10.

³⁵⁴ See above IV, 2. and below in this chapter.

³⁵⁵ See BREEN, Love, truth and economy, in *Har. J. of L. & P. Pol.*, 991; SISON, FONTRONDA, The common good of business, in *J. Bus. Ethics*, 100.

³⁵⁶ More exactly, the chapters are: II, Human development in our time. III, Fraternity, economic development and civil society. IV, The development of peoples, rights and duties, the environment. VI, The development of people and technology. Thus, only chapter one, The message of *Populorum progressio*, and chapter five, The cooperation of human family, do not have the word development in their title.

³⁵⁷ See *Caritas*, 8.

Caritas takes inspiration from *Populorum* we are already into some core arguments of *Caritas*.

One could say that *Populorum* tried to translate the Gospel's message with coherence for then surfacing problems of its time, seeing the global and post-modern viewpoint as new means for interpreting the contemporary world. After 40 years since Paul VI's encyclical, Benedict XVI finds it important to study *Populorum* as the most urgent issues addressed in that encyclical are still there waiting to be fully solved.³⁵⁸ As examples, we can notice the striking inequalities between different parts of the world and the hunger in the non-developed countries as core themes both in *Populorum* and *Caritas*. The problem of hunger indeed is central also in stimulating the thought of contemporary economists such as Amartya Sen, who describes our globalized world as one facing global inequalities.³⁵⁹

Twenty years after *Populorum*, half of the way to *Caritas*, John Paul II published *Sollicitudine rei socialis*, a commemoration and a theological tribute to the Letter about people's development, which was both a commemoration and an actualization that the pope from Poland considered necessary. Aware of all this, Benedict XVI puts himself on the same line as his two predecessors in continuing and actualising the work.

The perspective of 'eternal life'

Following the text of *Caritas*, I will now give a brief account of what Benedict XVI considers the most relevant points of *Populorum*, points which he wants to maintain as relevant through his encyclical. Initially, he recognizes how *Populorum* finds, referring to development, its source of meaning in Jesus Christ:

He [Paul VI] taught that life in Christ is the first and principal factor of development (see *Populorum*, 16) and he entrusted us with the task of travelling the path of development with all our heart and all our intelligence (see *Populorum*, 82), that is to say with the ardour of charity and the wisdom of truth. It is the primordial truth of God's love, grace bestowed upon us, that opens our lives to gift and makes it possible to hope for a 'development of the whole man and of all men' (*Populorum*, 42), to hope for progress 'from less human conditions to those which are more human' (*Populorum*, 20) [...].³⁶⁰

Assuming this as a primary presupposition, Benedict XVI places his first social encyclical in the same tradition as Paul VI's Letter. Benedict XVI follows the teaching of his predecessor when rooting development in God. What comes even closer to *Populorum*'s content, in terms of a direct theological influence, is a vision of life which developed during the Second Vatican Council.

Vatican II, as paraphrased in *Caritas*, went through an evaluation of the meaning of the RC Christian faith that during those council's years had been deepened and better analysed according to the theology of the RCC and according to the needs and the global evolutions as seen at that time. The acknowledgement of the

³⁵⁸ See *Caritas*, 21.

³⁵⁹ See A. K. SEN, *Globalizzazione: valore ed etica*, intervention at the conference on globalization organized by the Fondazione Falcone, in memory of Giovanni Falcone, May 23, 2001, in A., K. SEN, *Globalizzazione e libertà*. Milano: Mondadori, 2002. 11; A. K. SEN, A world of extremes: ten thesis on globalization. *Los Angeles Times*. July 17, 2001.

³⁶⁰ *Caritas*, 8.

Vatican II and of *Populorum* as sources of inspiration has newly inscribed the perspective of the social life of the human being in the theological horizon of the eternal life:

Without the perspective of eternal life, human progress in this world is denied breathing-space. Enclosed within history, it runs the risk of being reduced to the mere accumulation of wealth [...]. In the course of history, it was often maintained that the creation of institutions was sufficient to guarantee the fulfilment of humanity's right to development. Unfortunately, too much confidence was placed in those institutions, as if they were able to deliver the desired objective automatically. In reality, institutions by themselves are not enough, because integral human development is primarily a vocation, and therefore it involves a free assumption of responsibility in solidarity on the part of everyone. Moreover, such development requires a transcendent vision of the person, it needs God: without him, development is either denied, or entrusted exclusively to man, who falls into the trap of thinking he can bring about his own salvation, and ends up promoting a dehumanized form of development.³⁶¹

This quote summarizes many points that are at the basis of *Caritas'* intellectual background. The second part, especially, appears to be interesting for our analysis. According to what we have read, it becomes something essential to root human growth and development on a transcendental pre-supposition. The reflection on the social context implies a perspective regarding our life that goes beyond the material boundaries.

In Benedict XVI's discourse, to live with the perspective of 'eternal life' would mean to live not for instant gratification. Our aim, following this reasoning, should be that of building something in the present with the inner perspective that it is ultimately done for a life that will come afterwards. Without this perspective, Benedict XVI advises us, people risk to end up relying uniquely on the material and the immediately tangible world. Depending for sense and meaning only on the material aspects of life could slowly bury any transcendental inspiration that may arise. Benedict XVI assumes that each human being has within himself this desire for something beyond materiality and for comprehending his own life from a not-exclusively-material standpoint.

The contribution of religions to development

It is in the same atmosphere of *Populorum* and Vatican II that came the explicit consideration of the Roman Catholic Church in regards of other religions. Other forms of spirituality and religiosity can give good insights about each human being's transcendence's will.

This attitude was inserted in an official declaration of Vatican II, *Nostra aetate*, and in the dogmatic constitution *Lumen gentium*,³⁶² regarding the universality of the religious message:

³⁶¹ *Caritas*, 11.

³⁶² See SECOND VATICAN COUNCIL, *Lumen gentium*. 13 – 16. AAS 57. 1965; B. GIANOTTI, *I padri della Chiesa al concilio Vaticano II. La teologia patristica nella Lumen gentium*. Bologna: EDB, 2010. 396.

[...] other religions found everywhere try to counter the restlessness of the human heart, each in its own manner, by proposing ‘ways’, comprising teachings, rules of life, and sacred rites. The Catholic Church rejects nothing that is true and holy in these religions. She regards with sincere reverence those ways of conduct and of life, those precepts and teachings which, though differing in many aspects from the ones she holds and sets forth, nonetheless often reflect a ray of that Truth which enlightens all men. [...] The Church, therefore, exhorts her sons, that through dialogue and collaboration with the followers of other religions, carried out with prudence and love and in witness to the Christian faith and life, they recognize, preserve and promote the good things, spiritual and moral, as well as the socio-cultural values found among these men.³⁶³

With a philosophical outlook this position can be defined as ‘open inclusivism’, which means that an institution, in this case the Roman Catholic Church, does not aim to change the content of its own statements, but can accept external positions, coming also from different religious contexts, that coincide with relevant elements of its own doctrine.³⁶⁴ Within the theological discourse, a forerunner of some results of Vatican II was Karl Rahner with his theory of the ‘anonymous Christian’.³⁶⁵ This theory represents the ‘inclusivism’ we are talking about in the theological context of the RCC.³⁶⁶ It has been noted that if it is true that the theology of Karl Rahner has been somehow ‘censored’ before the Council, afterwards the atmosphere and the results of Vatican II represent ‘Rahner’s rehabilitation’.³⁶⁷ Undoubtedly, there has been a theological influence of Rahner’s theology from the period before the Council, especially regarding ecumenism and interreligious dialogue, on the texts of the Second Vatican Council.³⁶⁸

It is relevant to notice that Benedict XVI confirms the view officially established since Vatican II concerning the evaluation of other religious movements and institutions as positive sources for contributing to the well-being of peoples.³⁶⁹

From the theological basis of the Vatican II one understands more completely that *Caritas* recognizes transcendental awareness in each form of spirituality. In an epoch of intense globalization and religious tension such as today, it is important to know this recognition of other traditions.

³⁶³ SECOND VATICAN COUNCIL, *Nostra aetate*. 2, AAS 58, 1965.

³⁶⁴ See P. J. GRIFFITHS, *Problems of religious diversity*. Oxford: Blackwell, 2001. 60.

³⁶⁵ See K. RAHNER, *Das Christentum und die nichtchristlichen Religionen*, in *Schriften zur Theologie*, V. Einsiedeln: Benzinger, 1962. 136 – 158; and K. RAHNER, *Die anonymen Christen*, in *Schriften zur Theologie*, IV. Einsiedeln: Benzinger, 1965. 545 – 554.

³⁶⁶ See K. KILBY, *Karl Rahner. Theology and philosophy*. London: Routledge, 2004. 1, 116; T. O’MEARA, *God in the world: a guide to Karl Rahner’s theology*. Collegeville, MN: Liturgical Press, 2007. 1, 87 – 89; K. RAHNER, *Erinnerungen, im Gespräch mit Meinold Krauss*. Freiburg: Verlag Herder, 1984; A. MARRANZINI, Editoriale, in A. RÖPER, *I cristiani anonimi*. Brescia: Queriniana, 1967. 37 – 43.

³⁶⁷ See R. LENNAN, *The ecclesiology of Karl Rahner*. Oxford: Oxford University Press. 1995. 8, 266.

³⁶⁸ See E. I. CASSIDY, *Ecumenism and interreligious dialogue*. Unitatis redintegratio, Nostra aetate. New York: Paulist Press, 2005. 4.

³⁶⁹ On this particular characteristic of Vatican II see also M. RUOKANEN, *The Catholic doctrine of non-Christian religions. According to the Second Vatican Council*. Leiden: Brill, 1992.

Persons and institutions

In the second major quote in this chapter there is the statement that ‘institutions by themselves are not enough’. Here Benedict XVI points out one opinion he already clearly expressed in the previous encyclical *Spe salvi*, where he stated that ‘the right state of human affairs, the moral well-being of the world can never be guaranteed simply through structures alone, however good they are. Such structures are not only important, but necessary; yet they cannot and must not marginalize human freedom’.³⁷⁰ Regarding the role of institutions, we can say that according to Benedict XVI these are necessary, but do not entirely and absolutely fulfil what pertains to the duties and freedom of the human person.

Benedict XVI thinks that without any transcendental consideration of the human life, people can erroneously believe that the institutional level in society has solutions for every problem. Benedict XVI considers the human institutions, which are obviously useful, as tools for people’s free will. This means that institutions are not seen as the main end of human activity but just as means. In this he closely follows the teaching of Paul VI.³⁷¹ Benedict XVI stresses a risk regarding institutions, which they can take God’s place and would be addressed to solve problems just due to their being in existence. Obviously, the possibility to build fair worldly institutions implies the participation of all political actors, including those in developing countries. To be able to do this there is the need for responsible freedom also in those countries that do not share yet the well-being of the majority of the Western societies. In this sense, Amartya Sen proposes his view for the improvement of freedom. In its practical meaning, the improvement of democratic and political freedom is at one time the presupposition, and then the end, of any developmental process.³⁷² Thus, in Sen’s view, development coincides with freedom.

Benedict XVI emphasizes again the responsibility of each individual human person towards other human persons, both for those acting in institutions and those not. The practical consequence of this standpoint is that the institutional level is limited to that of an instrument for better achieving the common good. The reasoning is, in other words, that once the individual human being is aware of the proper responsibility for the well-being of other people, then institutions might work properly. To reach this particular awareness, to be conscious of one’s specific responsibilities towards others it is necessary, according to Benedict XVI, to put God in the horizon of our moral choices.

Development as ‘vocation’

Still referring to the main text of *Caritas*, we may now consider other arguments in Paul IV’s encyclical and consider why Benedict XVI sees these as relevant in our times. We consider now the meaning of ‘progress’, and its synonym ‘development’, and the consequences of this for the social doctrine.

The starting point for reflection upon development, within *Populorum* is in Paul VI’s interpretation of development as ‘vocation’:

³⁷⁰ BENEDICT XVI, *Spe salvi*, 24.

³⁷¹ ‘Paul VI had a keen sense of the importance of economic structures and institutions, but he had an equally clear sense of their nature as instruments of human freedom.’ *Caritas*, 17.

³⁷² See SEN, *Development as freedom*. The closeness of *Caritas*’ approach to that of Sen is also pointed in M. TOSO, *La speranza dei popoli. Lo sviluppo nella carità e nella verità*. Roma: LAS, 2009. 29.

In *Populorum progressio*, Paul VI taught that progress, in its origin and essence, is first and foremost a *vocation*: ‘in the design of God, every man is called upon to develop and fulfil himself, for every life is a vocation.’ (*Populorum*, 15) This is what gives legitimacy to the Church’s involvement in the whole question of development.³⁷³

One point Paul VI makes in identifying development with vocation is to state that each person participates in development, because each one is called by his personal and specific vocation to do something. And this ‘something’ regards the sense of development. This consideration regards the individual person in the common daily activities as well as the attitude of companies in the interaction with other institutions.³⁷⁴

But why, then, is it relevant for us to notice this identification of development and vocation? Saying that development is a vocation, and hence that human progress belongs naturally to human beings, as an aspiration coming from their inner awareness, means that human beings are called from the inside to develop.

The vocation is a calling, an invitation,³⁷⁵ and we intend so in this theological context. As it is easy to foresee, the Roman Catholic Church sees this calling as a transcendental one. We could say that Roman Catholic social thought recognizes here an element of God’s plan in putting human beings on their way to fulfilment. That we strive for development, in this way, is something that God accepts and helps us to accomplish. Moreover, the view proposed considers that people need to develop; we may say they need to realize themselves. The Roman Catholic Church considers this fact as a natural human property, therefore in line with God’s will. Social teaching definitely identifies this inner drive for progress and development as something that God wants us to follow for reaching the good in our social life. It is also for this reason that Benedict XVI believes *Populorum* to be a timelessly valid teaching of social doctrine:

To regard *development as a vocation* is to recognize, on the one hand, that it derives from a transcendent call, and on the other hand that it is incapable, on its own, of supplying its ultimate meaning. Not without reason the word ‘vocation’ is also found in another passage of the Encyclical [*Populorum*], where we read: ‘There is no true humanism but that which is open to the Absolute, and is conscious of a vocation which gives human life its true meaning.’ (*Populorum*, 42) This vision of development is at the heart of *Populorum progressio* [...]. It is also the principal reason why that Encyclical is still timely in our day.³⁷⁶

Therefore, development, according to the definition given in *Caritas* and, as introduced in the magisterium by Paul VI, means to recognize a transcendental call. Social teaching intends this vocation to be open to the ‘Absolute’. As we have read above also in other passages, we should not consider this world’s materialism as the

³⁷³ *Caritas*, 16.

³⁷⁴ *Caritas*, 11; See K. E. GOODPASTER, Goods that are truly good and services that truly serve: reflections on ‘*Caritas in Veritate*’, in *J. Bus. Ethics*, 100. 2011. 14; BREEN, Love, truth and economy, in *Har. J. of L. & P. Pol.*, 1010, 1022.

³⁷⁵ *Vocātus*, -ūs: appel, invitation. A. ERNOUT, A. MEILLET, *Dictionnaire étymologique de la langue latine*. Paris: Éditions Klincksieck, 1985. 754.

³⁷⁶ *Caritas*, 16.

ultimate criterion for evaluating choices and consequences of actions. That is why the Roman Catholic Church's social teaching, through *Populorum*, speaks of a development that must be 'integral' and 'human', defining it *integral human development*, as we can read in the some passages in the *Compendium* too.³⁷⁷ This means to include in the concept of development and progress a definition of what is 'human' that, in this case, is mainly given by the religious tradition of the Roman Catholic Church. Here, the Gospel, applied to a social extent, enlightens us about the true meaning of being human, which is, to be open to the absolute and to individuate within us a transcendental call towards supreme love.

Benedict XVI includes this perspective in his social theology, and in *Caritas* which according to its subtitle is an encyclical *on integral human development in charity in truth*. It is true that a difference between Paul VI and Benedict XVI is that the first had more concern than the second in understanding 'development' and 'progress' as major issues on the institutional and international levels rather than on the individual level. This is due to the historical context of *Populorum*, that had to consider the instances of the liberation theologies of Latin America, thus emphasizing the social and political aspects of development against structural social injustices. Moreover, those were the years in which the rise and implementation of international agencies of trade and finance, such as GATT (*General Agreement on Tariffs and Trade*, 1947) and the IMF (*International Monetary Fund*, 1945), was confirming that development, progress and justice were not issues to be faced exclusively with policies in the individual states, thus enlarging the view on such matters.³⁷⁸

Integral human development

Another point that appears to be relevant for seeing the significance of Benedict XVI's intellectual assumptions regards what he considers the truth about human progress. For being considered 'true', progress must be 'integral'. Integral, in the context of social teaching, means that once we remain open to guidance by God's will we cannot forget our brothers. When Paul VI says that true development must be integral he is expressing a concept which is very similar in content with what we have seen in the *Compendium*, when dealing with fraternity and solidarity among human beings.³⁷⁹ It regards the 'integration' of others into a developmental line. Namely, according to this view, we cannot proceed on the road of progress if we leave apart someone from this path. According to RC social teaching, this comes to be a definitive criterion of evaluation for our modern times. In this context we should include in the evaluation of the practical results of developmental policies also a judgement based on, we may say, human inclusion and exclusion.

In addition to this, the question to ask ourselves might be: are we truly experiencing progress when the material wealth is the main criteria of evaluation? From this follows another question: are we truly experiencing progress when our material successes only benefits a part of the world's population? To really proceed on a path of human growth, we should strive for having shared all the material profits, as well as immaterial advantages, with the largest possible worldly

³⁷⁷ See, above all, *Compendium* 4, 175.

³⁷⁸ See D. DORR, *Option for the poor and for the earth. Catholic social teaching*. Maryknoll, NY: Orbis Books, 2012. 160.

³⁷⁹ See above IV, 5.

population. Such a progress, here, does not coincide in full with the growth of economic indicators such as GDP (*gross domestic product*). The will to rethink some methods of analysis for what regards development and progress is something that regards also the world of the economists. Amartya Sen, Joseph Stiglitz and Jean-Paul Fitoussi share the purpose to look at the traditional methods of analysis with an innovative intention.³⁸⁰

We can conclude that if development reaches humanity as a whole and progress is shared, we have realized a transcendental end that social teaching speaks about. As *Caritas* reminds us, Roman Catholic social teaching wants not only the highest possible degree of development for the individual, but wants that same progress for all humans:

The truth of development consists in its completeness: if it does not involve the whole man and every man, it is not true development. This is the central message of *Populorum progressio*, valid for today and for all time. Integral human development on the natural plane, as a response to a vocation from God the Creator (see *Populorum*, 16), demands self-fulfilment in a 'transcendent humanism which gives [to man] his greatest possible perfection: this is the highest goal of personal development' (*Populorum*, 16).³⁸¹

Benedict XVI states here how the 'true' development not only requires the individual's *material* well-being but the whole person must be involved. Since in his theology the human person is both a material and spiritual being, this would mean that development necessarily has to leave space for non-material needs to be fulfilled and these immaterial instances need to be recognized. This last presupposition determines that *Caritas* considers as decisive factors in identifying human progress both the individual person's transcendental aspects and the spreading of material and spiritual advantages for all human beings. This conception of the human being is indeed present also in the previous encyclical of Benedict XVI, *Spe salvi*, for which 'man [...] is not merely the product of economic conditions, and it is not possible to redeem him purely from the outside by creating a favourable economic environment'.³⁸²

A transcendental humanism, in his view, is the way to pursue. In this sense the integral human development of *Caritas* inherits the personalist perspective of Mounier and Maritain that was already present in the social doctrine.³⁸³ The person should be considered in his/her specific integrity, and the development needs to be intended a development of people/persons.

In concluding this section on Paul VI and the concept of development, we may underline some elements which become relevant for having a clear outlook of the role of development in both Benedict XVI's encyclical and Roman Catholic Church's social thought of today.

³⁸⁰ See, for instance, J. E. STIGLITZ, A. K. SEN, J-P. FITOUSSI, *Mismeasuring our lives. Why GDP doesn't add up*. New York: The New Press, 2010.

³⁸¹ *Caritas*, 18.

³⁸² BENEDICT XVI, *Spe salvi*, 21.

³⁸³ See S. ZAMAGNI, Dalla 'Caritas in Veritate' la chiave interpretativa della crisi, in A. FERRO, P. SASSI, eds., *Cultura d'impresa e costruzione del bene comune. L'enciclica Caritas in veritate per un mondo migliore*. Città del Vaticano: Libreria Editrice Vaticana, 2010. 61.

Firstly, development is defined as a 'vocation'. It is a call to develop, to progress and to advance on being truly human. This call comes, in social teaching, from an inner tension that human beings have within them, put there by God. From this consideration comes a double-sided conclusion. Namely, the character of vocation is what gives to development its transcendental trait. But also, in this sense, the 'call to development' is considered by social thought as 'natural' in human beings.

Second, there is then a basic structure on which the concept of development is built in the Roman Catholic Church. Development, to be true and to be accepted as such by social teaching, must be integral and human. This means that not only should all aspects regarding the individual human person be taken into account when development is the object of study. Moreover, also we have to consider that any progress to be positively evaluated must regard all human beings and not only a restricted part. This is possible, says the encyclical, only when our development is open to the absolute, namely open to the word of God, to listen and to put it into practice.

Chapter VII – Perspectives from *Caritas in veritate* on our contemporary time

1. Introduction

I will try to show now how relevant the previous attention we have dedicated to Paul VI's encyclical has been. Especially the theme of *development, human and integral*, which means development for all people in terms of material and immaterial growth, is continuously present in *Caritas in veritate*. It is constantly called upon and specified again each time Benedict XVI feels the need to clarify what he considers the legacy of his predecessor.

We have seen that, according to social teaching, development has a sense only when it is something that regards each human being. This means, in macro-social terms, that it is not proper development when it ultimately regards exclusively a restricted number of countries and/or people. Development, and eventually economic growth, must be effective at the global scale if we want to speak of development according to Roman Catholic social doctrine. Upon this perspective, there must be a process involving all socio-economic actors in a large variety of objectives, from the diffusion of shared social and moral values, to more strictly economic material concerns. We should keep in mind that Benedict XVI considers the problems raised by Paul VI in *Populorum progressio* sadly enough to be tangible still today, and these problems regard for a large part the distribution of wealth in the world.³⁸⁴

Such a vision is shared by some secular thinkers, who reflected upon inequality and proposes practicable solutions. For instance, in 1990 Amartya Sen wrote:

The facts are stark enough. Despite the widespread opulence and the unprecedentedly high real income per head in the world, millions of people die prematurely and abruptly from intermittent famines, and a great many million more die every year from endemic undernourishment and deprivation across the globe. Further, hundreds of millions lead lives of persistent insecurity and want.³⁸⁵

For his part Benedict XVI draws his conclusions from reflecting on the heritage that modernity has left us. He sees in some processes of our epoch some direct and indirect causes of the economic and social failures of today, and we notice that this observation is present in different forms throughout its teaching. Modernity has brought some freedom in parallel with the expansion of civil rights, undeniably also economic freedom, and indeed progress and growth have involved many countries and billions of people have been nourished. But extreme inequalities among people persist, both between different countries and within national borders. In this sense we have to interpret the words of the Benedict XVI that recognizes some conquests of our age, but firmly criticizes specific contradictions. Material progress in one part of

³⁸⁴ See BENEDICT XVI, *Caritas in Veritate*. Città del Vaticano: Libreria Editrice Vaticana. 2009. 22.

³⁸⁵ J. DRÈZE, A. K. SEN, Introduction, in J. DRÈZE, A. K. SEN, eds., *The political economy of hunger. Vol. 1, Entitlement and well-being*. Oxford: Oxford University Press, 1990. 1.

the globe alone does not guarantee dignity and freedom for another part.³⁸⁶ Some are able to produce and consume a lot, as never in the past, while others struggle daily just to avoid starvation.

1.1. *The crisis, new points of departure*

A renewed conception of the human being according to the RC social thought should allow us to let emerge two elements that at this point of the analysis appear decisive. First, people are interdependent. And second, each human person's transcendental dignity needs to be respected. About the first, the interconnectedness of our world becomes clearer due to globalization and mass communication. Regarding the latter, in the Roman Catholic Church's eyes, the situation appears more complex as it involves many different aspects of human culture and society. Our age, as Benedict XVI understands it, too often takes into account only material aspects of life, and we are terribly worried about short-term perspectives based upon the results of costs/profit analyses.³⁸⁷ *Caritas* uses this criticism as a starting point for re-framing our conception about the human family and the meaning of being-here-together. Indeed, the crisis, as seen in social thought, is not only an economic crisis, but it is also a moral and spiritual crisis:

The different aspects of the crisis, its solutions, and any new development that the future may bring, are increasingly interconnected, they imply one another, they require new efforts of holistic understanding and a *new humanistic synthesis*. [...] The current crisis obliges us to re-plan our journey, to set ourselves new rules and to discover new forms of commitment, to build on positive experiences and to reject negative ones. The crisis thus becomes *an opportunity for discernment, in which to shape a new vision for the future*. In this spirit, with confidence rather than resignation, it is appropriate to address the difficulties of the present time.³⁸⁸

Benedict XVI sees that the crisis forces the people to understand the causes of this situation. In this perspective he sees an opportunity for understanding better where people need to rethink certain assumptions. Such awareness gives to the Benedict XVI also the possibility to show a certain 'confidence' concerning the results of this analytical and critical work on the contemporary crisis.

In *Caritas's* perspective, it is from the study and the reflection on the actual economic crisis that we should draw some relevant conclusions. These results allow us not merely to interpret what is happening now, but to give new directions to our ideas of, for instance, development and progress. Indeed, in Benedict XVI's view, economic processes, as well as globalization and cultural processes, are not impersonal forces acting at the human level, but they result from determinate human choices able to have an effective outcome.³⁸⁹ Instead of considering globalization exclusively as a shaping force, Benedict XVI wants to focus the attention on the possibility to influence the course of globalization. *Caritas* suggests that it is still

³⁸⁶ See *Caritas*, 21.

³⁸⁷ See *Caritas*, 21; 32.

³⁸⁸ *Caritas*, 21.

³⁸⁹ See *Caritas*, 42.

possible to set up foundations for having a sustainable framework of the world order. Such sustainability should not be intended as a naïve hope that we can put into practice a perfect social setting only because we have planned it. Relying on what we have seen in the previous chapter, we can say that Benedict XVI wishes that the economic growth would be also attached also to parameters of inclusion on a global scale. And we have seen that very similar concerns can be found in the writings of some economists.

1.2. Risks concerning the outsourcing of productive factors

Benedict XVI takes as the main reference period, for his socio-economic analysis the decades from the publication of Paul VI's encyclical *Populorum* (1967), until the present. In this period, in his view, certain processes that were initially only beginning now explicate their full potential, both for positive and negative aspects.

The extreme expansion of the global market and of privatization policies, among negative aspects, has tremendously weakened social state security and intensified some imbalances. Upon his view, in highly developed countries, social welfare has been cut often due to de-regulation policies having as a result the exclusion of many poorer citizens rather than their protection.³⁹⁰

Especially developing countries, as they are usually places into which production is out-sourced, could experience a deterioration of worker's rights and social protection caused by the penetrating economic conflicts led by the increasing size of global markets. This deterioration could be a negative consequence of a non-regulated process of expansion as well as of an uncompromising liberalism. In other words, the global market setting can eventually allow companies to delocalize their production chains those countries where labour can guarantee a lower total cost, so as to offer lower total prices for those goods once back on domestic markets.

What we observe in this perspective is that the economic expansion of markets shows its potential in opening new opportunities for progress. In the meanwhile, without proper regulation and without a sense of responsibility from entrepreneurs and politicians, the ultimate consequence could be the creation of a wave of non-protected workers. In Benedict XVI's view, local national states of developing regions almost abdicate their role of social welfare promoters, making the cost of labour attractive for uniquely-profit-oriented multi-national companies.³⁹¹ Eventually then, in the country of origin, there is the risk that diminishing workers' rights might appear sometimes as the preferable way for having investments done.

This phenomenon of delocalization, as we see it now in the Pope's interpretation, shows how liberal ways of economic development can give us wealth, but also prompts the risk of impoverishment. Benedict XVI explains such points referring to processes of market expansion and delocalization, in this way:

[...] the so-called outsourcing of production can weaken the company's sense of responsibility towards the stakeholders - namely the workers, the suppliers, the consumers, the natural environment and broader society - in favour of the shareholders, who are not tied to a specific geographical area and who therefore

³⁹⁰ See *Caritas*, 24 – 26.

³⁹¹ See *Caritas*, 25.

enjoy extraordinary mobility. Today's international capital market offers great freedom of action. Yet there is also increasing awareness of the need for greater *social responsibility* on the part of business. Even if the ethical considerations that currently inform debate on the social responsibility of the corporate world are not all acceptable from the perspective of the Church's social doctrine, there is nevertheless a growing conviction that *business management cannot concern itself only with the interests of the proprietors, but must also assume responsibility for all the other stakeholders who contribute to the life of the business: the workers, the clients, the suppliers of various elements of production, the community of reference.*³⁹²

It is probably naïve to identify the multi-national corporations as the villains of globalization. To be a firm on a multi-national level does not necessarily imply to act for the degradation of the world. But, at the same time, it is too simple to end the discussion saying that corporations strive for profits and only care about shareholders, and thus the other aspects need not count. Part of the problem lies exactly in recognizing that corporate social responsibility goes further than the contractual boundaries. It is about this broader social responsibility that *Caritas* speaks when it envisages 'a *profoundly new way of understanding business enterprise*'.³⁹³ There are also companies moving in such a direction, widening their perception of accountability. In this direction goes the analysis of the corporate social responsibility in contemporary management literature.³⁹⁴

Better conditions in a world with outsourcing of work needs also attention at the political level to see some institutional measure. The perspective outlined by Joseph Stiglitz goes in this way. According to him the political measures aiming at multi-national corporations should act with the objective 'to align private incentives with social costs and benefits'.³⁹⁵

In the economic analysis of Benedict XVI, workers are not a mere economic production factor among others. This is related to the fact that economic actions should be devoted, upon social thought's view, to the common good as an ultimate end, and not to profit.³⁹⁶ Workers' pre-eminence in pondering all economic and social reflections must be seen as an expression of that attitude in having human being's condition at the heart of the analysis.³⁹⁷

We can observe that Benedict XVI starts to redirect the focus of the analysis in *Caritas* from considerations on the macro-economic level regarding the crisis, to specific issues concerning workers and their rights, as well as issues concerning all people involved even tangentially by company's activity, those technically called the stakeholders. In this way the whole community in the broader sense is addressed. Obviously, we are speaking about a community that is made of persons. It can seem

³⁹² *Caritas*, 40.

³⁹³ See *Caritas*, 40; W. GRASSL, H. HABISCH, Ethics and economics: towards a new humanistic synthesis for business, in *Journal of Business Ethics*, 99. 2011. 38, 43 – 44; A. J. G. SISON, J. FONTRONDA, The common good of business: addressing a challenge posed by 'Caritas in Veritate', in *Journal of Business Ethics*, 100. 2011. 100.

³⁹⁴ See K. E. GOODPASTER, Goods that are truly good and services that truly serve: reflections on 'Caritas in Veritate', in *J. Bus. Ethics*, 100. 2011. 12 – 15.

³⁹⁵ See J. E. STIGLITZ, *Making globalizations work*. W. W. New York: Norton & Company, 2006. 198.

³⁹⁶ See GRASSL, HABISCH, Ethics and economics, in *J. Bus. Ethics*, 43.

³⁹⁷ See above V, 3.

easy and reasonable that human beings come before profits, but it is worrying that it must be so often called to mind. Here we can also see how in the economic perspective presented in *Caritas* the macro level and the micro level of the analysis are integrated.³⁹⁸

In economic activity workers are central because of their role in materially producing something but, in the Roman Catholic Church's perspective, this relevance goes well beyond the mere economic issue of work as one productive factor. Work is made by workers, which are human beings: their dignity as human beings cannot be weakened by being workers. It is from such considerations that Benedict XVI expresses his considerations on the role of trade unions in contemporary times. Labour unions are thought to understand their role of safeguarding human conditions of work also at the global level, and not only within national borders.³⁹⁹ This coincides with what we have already seen in the analysis of the *Compendium*'s.⁴⁰⁰

2. The need for an 'enlarged reason'

As a possible practicable path towards different economic scenarios, Benedict XVI wishes cooperation among different disciplines, such as economics and morals. Basically, Benedict XVI, following the line developed in the 1998 encyclical of John Paul II *Fides and ratio*, calls for more openness in each particular space of scientific knowledge, such as biology and engineering towards, morals.

Caritas criticizes what is perceived as the exaggerated uncommunicative situation among these fields-of-knowledge. In social thought's view, for our specific case, the separation of science and morality causes some unsatisfying results that have brought some sciences, among which Benedict XVI includes economics, working outside an ethical framework.⁴⁰¹ As far as economists study the economic processes, namely 'things as they are', it does not seem necessary any moralization of the economic science. The moral concern is seen necessary when in the economic environment economic tools are used, as for instance might be in the financial world, to increment profits in the short term without a long term perspective, or when profits are made in a country without considering whether they are made upon the exploitation of workers or the devastation of the natural environment.

Benedict XVI argues that the Roman Catholic social doctrine may bring an original and fresh view due to its inner inter-disciplinary character.⁴⁰² The appraisal made of social teaching suggests that without renouncing a common ground of principles, each sort of specific knowledge or wisdom has its own space and identity, and it remains both independent as well as in constant communication and openness with others. It seems, in other words, that Benedict XVI proposes a methodology that would avoid 'the excessive segmentation' of scientific knowledge.

³⁹⁸ See GRASSL, HABISCH, Ethics and economics, in *J. Bus. Ethics*, 44.

³⁹⁹ See *Caritas*, 64.

⁴⁰⁰ See above V.

⁴⁰¹ See A. YUENGER, Economics and interdisciplinary exchange in Catholic social teaching and '*Caritas in Veritate*', in *J. Bus. Ethics*, 100. 2011. 47.

⁴⁰² See *Caritas*, 31.

Besides, Benedict XVI proposes an integrated effort with the aim of respecting each knowledge's dignity, trying at the same time not to fall in ephemeral mixes or unworthy compromises. In this line, *Caritas* adopts the conclusions of previous social thought and projects them on our study's ground on economics and social development:

The excessive segmentation of knowledge (see JOHN PAUL II, *Fides et ratio*. 1998. 85, AAS 91, 72 - 73) the rejection of metaphysics by the human sciences (see *Fides*, 83), the difficulties encountered by dialogue between science and theology are damaging not only to the development of knowledge, but also to the development of peoples, because these things make it harder to see the integral good of man in its various dimensions. The 'broadening [of] our concept of reason and its application' (BENEDICT XVI, *Address at the University of Regensburg*. 12 September 2006.) is indispensable if we are to succeed in adequately weighing all the elements involved in the question of development and in the solution of socio-economic problems.⁴⁰³

The problem that we can call an epistemology of the human sciences, even when not expressively stated like here in *Caritas*, was still present also in previous social encyclicals.⁴⁰⁴ Benedict XVI here takes a position present in the RC interpretation of the human sciences since Vatican II⁴⁰⁵ and *Populorum*. To say that there are difficulties in the dialogue between science and theology implicitly means to point at the effort in social thought, in which on a theological basis suggestions for other particular sciences are developed. Moreover, though Benedict XVI criticizes a narrow rationality that tends to forget the contribution of faith, he also points to the reciprocal collaboration of faith and reason placed on an equal level.⁴⁰⁶ With this discussion there is the proposal for broadening our concept of reason.

For his part, in line with Vatican II,⁴⁰⁷ in which the RCC officially recognised the value of scientific knowledge and its specificity for the well-being of humanity, Benedict XVI has asked others for help in preparing the encyclical. In the RCC, one primarily thinks of bishops and members of Pontifical Councils such as *Justitia et Pax*, including those people who developed the *Compendium of the social doctrine of the Church*. However, Benedict XVI also consulted professors in the field of economics.⁴⁰⁸ Stefano Zamagni indeed confirms that he 'was a member of a task force, set up by the Holy Father [...] in order to write the Encyclical Letter'.⁴⁰⁹

⁴⁰³ *Caritas*, 31.

⁴⁰⁴ See YUENGERT, Economics and interdisciplinary exchange in Catholic social teaching and 'Caritas in Veritate', in *J. Bus. Ethics*, 44 – 48.

⁴⁰⁵ See *Gaudium*, 36.

⁴⁰⁶ As specified in *Caritas*: 'Reason always stands in need of being purified by faith: this also holds true for political reason, which must not consider itself omnipotent. For its part, religion always needs to be purified by reason in order to show its authentically human face. Any breach in this dialogue comes only at an enormous price to human development.' *Caritas*, 56.

⁴⁰⁷ See *Gaudium*, 62 and above I, 6.

⁴⁰⁸ We know that 'the most common names are card. R. Martino and Rodríguez Maradiaga, G. Crepaldi and R. Marx, experts like M. Toso, M. Ronheimer, S. Zamagni, E. Gotti Tedeschi, and the contribution of many preparatory meetings among which that with cardinals C. Ruini, C. Schönborn, A. Scola e A. Bagnasco.' EDITORIALE, *Benedetto XVI. Lettera enciclica Caritas in veritate*, in *Il Regno*, 14. 2009. 434 [my translation from the Italian].

⁴⁰⁹ ZAMAGNI, S., *Caritas in veritate*, market and firms. The Catholic Church's position on economy.

3. *Charity in truth globalized*

Today the level of interdependence level among countries and peoples in the world has reached a degree that was hardly foreseeable at the time of Paul VI. That is why our reason more now than in the past needs to be open in all those ways that might help the process towards people's integration. If since the sixties, the period in which *Populorum* was written, globalization augmented its influence in the world's dynamics almost exponentially, it must be stressed that Benedict XVI specifies that in his opinion the answers to any demand for open-mindedness have not been adequate.

Globalization has gained benefits from technological advancements, but it has also proceeded due to its inner character of being partially autonomous from technology and pushed by the humankind's intrinsic relational character as social thought interprets it.⁴¹⁰ In Benedict XVI's opinion, regulative measures capable of spreading the benefits of globalization have been limited. Making a political-economic consideration he states how the presence of taxes and duties that poor countries have to pay for having access to developed countries' markets has somehow worsened the general evaluation we may express on globalization.⁴¹¹ It is indeed in this milieu that Benedict XVI poses charity and truth as resources for that necessary force able to bring the human family closer instead of dividing it:

[Hence] charity and truth confront us with an altogether new and creative challenge, one that is certainly vast and complex. It is about *broadening the scope of reason and making it capable of knowing and directing these powerful new forces*, animating them within the perspective of that 'civilization of love' whose seed God has planted in every people, in every culture.⁴¹²

A 'civilization of love' would mean to build a new civilization based on fraternal love, which is the role that Benedict XVI wishes for charity, namely to be the ground for our progress in civilization.

He prospers a civilization path that spreads from charity. He points that if all sorts of technological advancements are directed by an enlarged reason that sees the scopes and objectives under the light of charity in truth, then we could reach that kind of civilized society in which different cultures and different people are able to live together. In other words, the effort that the human beings are able and ready to do in the field of reason, eventually also a technological reason, should have the scope of improve the quality of living together in one same world. In this perspective, then, we may say that what in the end should 'build' the dialogue between the Roman Catholic social doctrine as here proposed by Benedict XVI and the scientific world, including economics is nothing else but love, charity.⁴¹³ This charity is the same of the locution 'charity in truth', as we have analysed it above.⁴¹⁴

An interview by Renato Mangano, in *European Company and Financial Law Review*, 1. 2011. 65

⁴¹⁰ See *Gaudium*, 25.

⁴¹¹ See *Caritas*, 33.

⁴¹² *Caritas*, 33.

⁴¹³ See YUENGERT, Economics and interdisciplinary exchange in Catholic social teaching and 'Caritas in Veritate', in *J. Bus. Ethics*, 49.

⁴¹⁴ See YUENGERT, Economics and interdisciplinary exchange in Catholic social teaching and

4. Market and its justice. Caritas in veritate's viewpoints

In this section I will underline the more detailed criticism present in *Caritas* towards the market economy and market institutions, but their merits will be addressed as well. It should be remarked now that the market has no essentially negative connotation according to the theological implications at the basis of the RC social thought, or at least this is not the intention of social teaching.

Benedict XVI does not see intrinsic evil in market economy itself, but sees responsibilities in people acting in this context. The market is a mere tool; therefore responsibilities are those of people who use that tool.

Some time before the beginning of his papacy, Joseph Ratzinger had pointed out what he thinks a mistake, namely the reduction of what is human to a single category, whether economical or political.⁴¹⁵ That economic actions are human actions is in *Caritas* the relevant element that makes ethics not out of place in the economic world.⁴¹⁶ In such a view *Caritas* also fits within social teaching in general, for which the passage, reduction, from human being to economic agent appears deceptive.⁴¹⁷

Benedict XVI is presenting us some of the Roman Catholic Church's considerations on market practices that should appear even more actual and pregnant in a globalized economy. According to his view, a market has an intrinsic capacity to let people encounter each other within its borders. In this sense the market brings and builds a level of socialization that cannot be ignored because effectively it helps society to grow. This vision seems also to reflect that of Luigino Bruni and the Economy of communion, that we will soon see, in which the market is understood as having a socializing potential.⁴¹⁸

The market, due to this inner social dimension, needs a determinate degree of fraternity; it needs to be social in order to operate in society. Or, to put it better, Benedict XVI states that market itself cannot be a sustainable institution as long as in it there is no room for gratuity in some way. This is so, because gratuity is the source of that communal living in which the market could flourish even better. This should appear more evident in our contemporary time in which we witness an expansion of the market never seen before. Within social thought's structure, the market seems to be exactly part of that communal living, in which indeed it was born and it develops.

More in detail, according to Benedict XVI, within the market a principle of commutative justice (based on the exchange) governs, for which people's free decisions encounter each other on the basis of contractual agreement and equal exchange. The market system as a whole also needs to answer questions coming from the needs of social justice and distributive justice, because the market system itself was born in a social context. In such a perspective, the market has and

'*Caritas in Veritate*', in *J. Bus. Ethics*, 48 – 51.

⁴¹⁵ See J. RATZINGER, Introduction to Christianity: yesterday, today, and tomorrow, in *Communio*, 31. 2004. 485.

⁴¹⁶ See *Caritas*, 36 – 37; D. MELÉ, M. NAUGHTON, The encyclical-letter *Caritas in veritate*: ethical challenges for business, in *Journal of Business Ethics*, 100. 2011. 4; J. M. BREEN, Love, truth and economy. A reflection on Benedict XVI's *Caritas in veritate*, in *Harvard Journal of Law and Public Policy*, 33. 2010. 998 – 999.

⁴¹⁷ See above I, 3.

⁴¹⁸ See below VII, 6.

maintains its own specific realm of laws, but the fact that the market grows and flourishes exclusively in social environments, and the fact that it expresses anyhow a social attitude, makes it an institution that necessitates solidarity to operate at its best:

In a climate of mutual trust, the *market* is the economic institution that permits encounter between persons, inasmuch as they are economic subjects who make use of contracts to regulate their relations as they exchange goods and services of equivalent value between them, in order to satisfy their needs and desires. The market is subject to the principles of so-called *commutative justice* [...]. But the social doctrine of the Church has unceasingly highlighted the importance of *distributive justice* and *social justice* for the market economy, not only because it belongs within a broader social and political context, but also because of the wider network of relations within which it operates. In fact, if the market is governed solely by the principle of the equivalence in value of exchanged goods, it cannot produce the social cohesion that it requires in order to function well. *Without internal forms of solidarity and mutual trust, the market cannot completely fulfil its proper economic function.*⁴¹⁹

Without solidarity the economy would not work. This is Benedict XVI's view when he states that 'if the market is governed solely by the principle of the equivalence in value of exchanged goods, it cannot produce the social cohesion that it requires in order to function well.' In addition to this, the market needs the contractual agreement to be trusted by both parties, and eventually the guarantee of a third trusted party, usually with juridical and public character. This eventually shows that we can find elements, like trust, that do not exclusively belong to the context of the exchange for the equivalent between two solitary agents uniquely driven by selfish motives.

The point made by *Caritas* is that when left to its own regulative parameters and nothing else, the economic mechanisms of the market there is the risk to make inhumane the social context in which it is working.⁴²⁰ Here the analysis can be done on two levels: one more institutional and theoretical, 'macro', and one more personal, 'micro'.

On a theoretical level we look to the relationships between economics and ethics. Again, economics remains a stand-alone science with a peculiar field of knowledge and specific operating principles, like in market economies happens. But the same fact that the economy is, we may say, embedded in the social texture might call for an evaluation of the social consequences in all the economic activities. This consideration calls for an awareness at the level of economic theories, and thus of the economists, that such theories are incomplete.⁴²¹ The embeddedness of market economy in the social texture is a major element in the analysis of Karl Polanyi. He sees a detachment of the modern market economy from its social ground, and identifies this as probably the main causes for the lack of moral concerns in the same

⁴¹⁹ *Caritas*, 35.

⁴²⁰ See GOODPASTER, Goods that are truly good and services that truly serve, in *J. Bus. Ethics*, 10.

⁴²¹ See P. H. DEMBINSKI, The incompleteness of the economy and business: a forceful reminder, in *Journal of Business Ethics*, 100. 29 – 30, 39. For which the 'incompleteness argument', if seriously faced, should concern politician, economists and managers and push them to constantly reflect on the reflections of their activity for the civil society. See also BREEN, Love, truth and economy, in *Har. J. of L. & P. Pol.*, 994 – 997.

market environment.⁴²² Polanyi's theory goes further with his thesis of 'contagion', according to which exclusively-self-interest driven market mechanisms and practices are progressively transferred to other institutions.⁴²³ Moreover, a similarity between these aspects of the social analysis of Polanyi and Benedict XVI's analysis has been pointed out, as opposed to the Marxism found in liberation theologies.⁴²⁴

The logic of the gift

We arrive then at a second level of analysis, more particular, that regards the agents in their economic context. For this, *Caritas* calls for a general mobilization at the level of our 'hearts'.⁴²⁵ It means that the agents in the economic context are supposed to act freely and firstly with the objective of realizing human fraternity through the pursuit of the common good.⁴²⁶

It is in this context that Benedict XVI speaks about 'the gift'. Difficulties in analysing *Caritas*' perspective on the gift are due to the fact that Benedict XVI does not give us a punctual and precise definition of what he means by 'the gift'. The references in the Encyclical point to the gift as identified with the logic of gratuitousness for which giving-for-free does not demand something back in return.⁴²⁷ About the gift, Benedict XVI refers to the free gift of love that God gives to the human beings with the creation, intending the natural environment as God's gift.⁴²⁸

Here, our attention is towards the contribution that the free-giving may give to the market economy in the eyes of Benedict XVI:

The economy in the global era seems to privilege the [...] logic [...] of contractual exchange, but directly or indirectly it also demonstrates its need for the other two: political logic, and the logic of the unconditional gift.⁴²⁹

Firstly, we notice that the gift is a requirement enhanced by the globalization of economic relationships.⁴³⁰ Secondly, Benedict XVI appears convinced that in addition to the contractual logic the economic world needs also a political logic. This latter requirement, in the context of *Caritas*, refers to the renewed role that Benedict XVI wishes for politics in the global world. We are going to see his perspective closer in the next chapter.

⁴²² See K. POLANYI, *The great transformation. The political and economic origins of our time*. Boston: Beacon Press, 2001. 60. The same ideas are also sociologically developed in M. GRANOVETTER, R. SWEDBERG, eds., *The sociology of economic life*. Boulder, CO: Westview Press, 2011.

⁴²³ See S. ZAMAGNI, Catholic social thought, civil economy, and the spirit of capitalism, in D. K. FINN, ed., *The true wealth of nations. Catholic social thought and economic life*. New York: Oxford University Press, 2010. 85.

⁴²⁴ See A. PABST, The paradoxical nature of the good. Relationality, sympathy and mutuality in rival traditions of civil economy, in A. PABST, ed., *The crisis of global capitalism. Pope Benedict XVI's social encyclical and the future of political economy*. Eugene, OR: Cascade Books, 2011. 181 – 182.

⁴²⁵ See *Caritas*, 20.

⁴²⁶ See DEMBINSKI, The incompleteness of the economy and business, in *J. Bus. Ethics*, 34.

⁴²⁷ See *Caritas* 34.

⁴²⁸ See *Caritas*, 48.

⁴²⁹ *Caritas*, 37.

⁴³⁰ See MELÉ, NAUGHTON, The encyclical-letter *Caritas in veritate*, in *J. Bus. Ethics*, 5.

For what regards the logic of the unconditional gift *Caritas* does not give us any specific definition, but still there should be something that might allow us to reason about it. We understand *Caritas* as inscribed in the context of the Roman Catholic theology of Benedict XVI. Thus, we have insight of what the term ‘gift’ might refer to if we refer to ‘gift’ in the wider theological perspective of *Caritas*.

This results in understanding gift as free-giving, having as the ideal example the gratuitousness that regards God in the act of creation.⁴³¹ In the theology of *Caritas*, God does not make contracts with the human being or with other creatures. God only gives, and does not look for the exchange. Transferred to the economic actors this notion of the gift can represent an alternative to contractual exchange.⁴³² Regarding these ideas, the logic of gift-giving regards the circulation of goods, and thus also the re-distribution of wealth.

Our understanding of the gift as intended in *Caritas*, thus with a theological basis, could be further improved with a more interdisciplinary approach. With all the caution that an interdisciplinary approach needs, we should not ignore that on the meaning of gift in *Caritas* it has been proposed to consider the study made in the field of anthropology of economics by Marcel Mauss,⁴³³ the *Essai sur le don*.⁴³⁴ And for understanding better the logic of the free-giving in our contemporary societies the study of Richard Titmuss about blood donations, *The gift relationships*,⁴³⁵ may furnish relevant insights.⁴³⁶

In the end, understanding the logic of the gift in the context of the market economy would mean to open our possibilities also to economic motives that go beyond those strictly belonging to the market practices, such as the making of instant profits.⁴³⁷ Implicitly, this represents the conviction of Benedict XVI that there might be other motives in people acting in the economic context in addition to those considered in the classic and neo-classic economic theories.⁴³⁸

It has been noticed how an improvement that *Caritas* brings to the previous social teaching is the role of love in the economic motives. In this sense the needs of the needs of the poor, the gratuitousness of acting for the other, are all elements found in *Caritas* that upgrade the level of practicality of a social doctrine that wants

⁴³¹ See *Caritas*, 34 – 39, 48.

⁴³² See G. FALDETTA, The logic of gift and gratuitousness in business relationships, in *J. Bus. Ethics*, 100. 2011. 68.

⁴³³ See FALDETTA, The logic of gift and gratuitousness, in *J. Bus. Ethics*, 69; D. MCCANN, The principle of gratuitousness: opportunities and challenges for business in ‘*Caritas in veritate*’, in *J. Bus. Ethics*, 100. 2007. 58 – 62.

⁴³⁴ M. MAUSS, *The gift: the form and reason for the exchange in archaic societies*. London: Routledge, 2002.

⁴³⁵ R. M. TITMUSS, *The gift relationship. From human blood to social policy*. London: George Allen & Unwin Ltd., 1970. In particular chapters 5 and 13, for the relation with the gift spirit.

⁴³⁶ See FALDETTA, The logic of gift and gratuitousness, in *J. Bus. Ethics*, 70; A. ARGANDOÑA, The ‘logic of gift’ in business, from ‘*La Caixa*’ *Chair of Corporate Social responsibility and Corporate Governance*, working paper WP-936. 2011.

⁴³⁷ S. ZAMAGNI, Fraternity, gift and reciprocity in *Caritas in veritate*, in PABST, *The crisis of global capitalism*, 163 – 164.

⁴³⁸ See S. ZAMAGNI, Fraternalità, dono, reciprocità nella *Caritas in veritate*, in S. BERETTA, V. COLMEGNA., F. FELICE, B. SORGE, S. ZAMAGNI, *Amore e verità. Commento e guida alla lettura dell’Enciclica Caritas in veritate di Benedetto XVI*. Milano: Edizioni Paoline, 2009. 80; ZAMAGNI, Fraternity, gift and reciprocity in *Caritas in veritate*, in PABST, *The crisis of global capitalism*, 156 – 157.

to commits itself to the possibility of having love as the foundational element of the social living.⁴³⁹

In the field of economics such an approach is not unknown. Amartya Sen has pointed to some limits of those economic theories that have at their basis mainly or exclusively the self-interested behaviours of the economic actors.⁴⁴⁰

Benedict XVI recognizes the utility and the necessity of the market as the economic institution of the free encounter of different interests. But in his view there is also the idea that the economic world is not exclusively based on the logic of commutative justice. For instance, it has been pointed out how the logic of gift is already present in economic organizations, notwithstanding the necessity to study more in depth such presence.⁴⁴¹

Even if ‘the economy in the global era seems to privilege the logic of contractual exchange’, Benedict XVI points that there is the need for other two logics. The political logic is needed to furnish the proper institutional structure, and the logic of the gift is the main expression of human solidarity. In *Caritas* it is also considered a major requirement for the well-being of the globalized economic system.⁴⁴²

The assumption that social teaching makes is that there is a moral issue connected to each fact that has an economic relevance. Moreover, in this globalized age we especially face economic facts through their interdependence, as reciprocal influences among distant countries are not merely accidental:

Locating resources, financing, production, consumption and all the other phases in the economic cycle inevitably have moral implications. *Thus every economic decision has a moral consequence.* The social sciences and the direction taken by the contemporary economy point to the same conclusion. Perhaps at one time it was conceivable that first the creation of wealth could be entrusted to the economy, and then the task of distributing it could be assigned to politics. Today that would be more difficult, given that economic activity is no longer circumscribed within territorial limits, while the authority of governments continues to be principally local. Hence the canons of justice must be respected from the outset, as the economic process unfolds, and not just afterwards or incidentally.⁴⁴³

Benedict XVI points out that there is a huge incongruity between the political/normative level and the economic/social level. What we observe is an international economy operating with market rules that do not pose any barrier to economic expansion. At the same time, political regulations and institutional redistributive entities are fragmented as these belong to local governments. This imbalance may cause a short-circuit. When wealth, from production or any other

⁴³⁹ See D. DORR, *Option for the poor and for the earth. Catholic social teaching*. Maryknoll, NY: Orbis Books, 2012. 369.

⁴⁴⁰ See A. K. SEN, *Rational fools: a critique of the behavioural foundations of the economic theory*, reprinted in A. E. KOMTER, ed., *The gift. An interdisciplinary perspective*. Amsterdam: Amsterdam University Press, 1996. See also S. ZAMAGNI, Prefazione, in A. K. SEN, *La ricchezza della ragione*. Bologna: Il Mulino, 2000.

⁴⁴¹ See FALDETTA, *The logic of gift and gratuitousness*, in *J. Bus. Ethics*, 75.

⁴⁴² See *Caritas*, 32.

⁴⁴³ *Caritas*, 37.

economic activity in one country, is not distributed properly according also to the needs within that country's borders, there would be the need for a counter-balance. In brief, this opinion concerns how the economy works at the inter-national level, while politics remains stuck at the local level of government.

Thus, *Caritas* points out how market practices should respect the canons of justice. This means to respect a moral order previously built. Benedict XVI also states that the respect needed for the demands of justice in economic activity should be fulfilled from its beginning, and not once it is concluded. This means that checking the consequences of an economic action is something that should be preferably done in a stage previous to its implementation, and not afterwards as to repair something. According to *Caritas*, a moral concern should precede the economic activity as such, in this way setting its direction. In the Pope's view this would mean for economy to work properly, within the framework established by moral laws.

There is another element then that emerges from the reading of *Caritas*. That is the general emphasis that Benedict XVI gives to the role of the individual person in the economic framework. Namely, the moral concern of the economic actions should regard primarily the individual economic actor. Only in a second phase the moral assumptions are transferred to the institutional level. There is a general re-consideration of the role of institutions for sustainable development.⁴⁴⁴ In the context of social teaching, institutions play a decisive role in the economic world.⁴⁴⁵ And we can also agree with Dorr that the RC social doctrine also criticizes 'sinful structures', when these become the cause of injustice.⁴⁴⁶ Nevertheless, in *Caritas* we notice the tendency of underlining the relevance of individual actions in building a fair economic context, thus in being also a responsible part in building fair structures.⁴⁴⁷

We can also notice from the last quote how *Caritas* appeals to the latest developments in some of the social sciences and economics regarding the relationship between morals and economy. Indeed, there is a certain convergence from some intellectual environments towards a re-consideration of the roles of economic actors, consumers and public authorities, and eventually also economists in their working on models. On the economic side we can cite Amartya Sen, Jean-Paul Fitoussi and Joseph Stiglitz, and on a sociological and philosophical side the ideas of Zygmunt Bauman and Martha Nussbaum. The works of these thinkers may represent a prosperous and fertile intellectual ground for the debate on such topics. All these thinkers appear to share with Roman Catholic social doctrine the will to discuss the position of the human being in the process of social and economic globalization.

5. Business ethics according to Caritas in veritate

In *Caritas* we find various insights that suggest that Benedict XVI believes that in rooting economic actions on a moral ground is a key for sustainable economic development. He argues that if economic decisions are taken under the condition that they fit with a specific moral setting, then there might be also economic advantages.

⁴⁴⁴ See for instance *Caritas*, 71.

⁴⁴⁵ See above I, 4.

⁴⁴⁶ See DORR, *Option for the poor and for the earth*, 456.

⁴⁴⁷ See GOODPASTER, Goods that are truly good and services that truly serve, in *J. Bus. Ethics*, 11.

This is, in other words, the conviction that economic convenience and profit can come from respect for a set of moral norms. It has been pointed how economics has the capacity to ‘challenge the faculty of ethical judgment, as it may inform about unintended consequences of certain social or political postulates’, in this way fostering a sustainable development in a ‘dynamic two-way relationship’.⁴⁴⁸

Benedict XVI notices the large diffusion in the business world of economic initiatives characterized by an ethical inspiration or with general ethical aims. He also stresses how certain initiatives could be helpful not merely for giving to developed economies some new fresh air to breath within the established financial environment, as he praises how these initiatives could be substantially helpful for the emerging economies on their way to sustainable progress. *Caritas* recognizes the augmenting interest in economic activity that can be defined with the adjective ‘ethical’.⁴⁴⁹

Notwithstanding the positive outlook towards business ethics, Benedict XVI underlines the concrete risk in leaving the adjective ‘ethical’ to a lax determination or to an imprecise definition of its content.⁴⁵⁰ He claims how leaving ethics to a generic or superficial interpretation opens the possibility of abusing its use and consequently emptying its meaning, without any significant result also on the economic ground.

In this regard, Benedict XVI also specifies that what is needed is an ethic which is ‘people-centred’. He believes that the social doctrine of the RCC can contribute to this specific ethical demand. The people, namely the persons, should be the centre of the ethical preoccupation. And in this element he sees a possible specific contribution of the RC social doctrine.⁴⁵¹

This point becomes relevant as we have here a clarification from Benedict XVI that points out why Roman Catholic social teaching may contribute to build a moral framework for economic action due to two specific characteristics. In this, we may again observe the theological inspiration with which the RCC legitimizes its social teaching:

[...] the Church’s social doctrine can make a specific contribution, since it is based on man’s creation ‘in the image of God’ (Gen 1: 27), a datum which gives rise to the inviolable dignity of the human person and the transcendent value of natural moral norms. When business ethics prescind[s] [sets aside] from these two pillars, it inevitably risks losing its distinctive nature and it falls prey to forms of exploitation; more specifically, it risks becoming subservient to existing economic and financial systems rather than correcting their dysfunctional aspects.⁴⁵²

Benedict XVI states that social thought can give a specific contribution to business ethics. This contribution has a twofold character. First, it concerns the inviolable character of the human person, and second, the transcendental value deriving from the natural moral laws. These concepts, both growing from the Roman Catholic

⁴⁴⁸ GRASSL, HABISCH, Ethics and economics, in *J. Bus. Ethics*, 45.

⁴⁴⁹ See MELÉ, NAUGHTON, The encyclical-letter *Caritas in veritate*, in *J. Bus. Ethics*, 3 – 4.

⁴⁵⁰ See, for these general considerations, *Caritas*, 45.

⁴⁵¹ M. ZWICK, L. ZWICK, Beyond the culture of cutthroat competition. The Pope takes the world by surprise, in PABST, *The crisis of global capitalism*, 129

⁴⁵² *Caritas*, 45.

interpretation of the human person as created in the image of God, refer indeed to the same concepts that we have previously seen.⁴⁵³ In other words, here, we observe the reflection of the personalist principle in the economic context of business ethics.⁴⁵⁴ We may say that these are the conditions under which it is possible to build an ethical ground for economics, according to *Caritas*.

The main aim of Benedict XVI seems to show that ethics should be introduced not simply at the surface level of the economic world, but it must be part of it from the beginning. Economy should be ethical by definition, in the sense that all that regards economy should be understood in ethical terms, and not by coincidence.

In the above quote, the specific topic of the financialization of economy is faced in *Caritas* in general terms, and with a pastoral aim that seems directed to touch the conscience of all people of good will who might be operating in the field of financial economy. Nevertheless, we are going to see in the next chapter how Benedict XVI believes that for a global development there is the need of a global authority rooted in the principles of subsidiarity and solidarity, emphasizing, thus, also more ‘structural’ aspects of the topic.

When we remain for now focussing on the role of individual initiatives, we see how Benedict XVI also recognizes the utility of some private initiatives that have concretely realized a fairer financial environment. The reference is towards micro-credit or micro-finance. Even if not expressively quoted in *Caritas*, such considerations can easily bring us to think of the Nobel peace prize awarded by Muhammad Yunus for his Grameen Bank.⁴⁵⁵ A similar positive evaluation of initiatives such as the Grameen Bank comes also from thinkers like Amartya Sen, who recognizes the role of such initiatives exactly in opening new economic possibilities.⁴⁵⁶ In this specific case Sen also referred to the improvement of women’s conditions thanks to the Grameen Bank’s targeting activity.⁴⁵⁷

In *Caritas* Benedict XVI praises these sorts of activities:

[...] the *experience of micro-finance*, which has its roots in the thinking and activity of the civil humanists - I am thinking especially of the birth of pawnbroking - should be strengthened and fine-tuned. This is all the more necessary in these days when financial difficulties can become severe for many of the more vulnerable sectors of the population, who should be protected from the risk of usury and from despair. [...] Since rich countries are also experiencing new forms of poverty, micro-finance can give practical assistance by launching new initiatives and opening up new sectors for the benefit of the weaker elements in society, even at a time of general economic downturn.⁴⁵⁸

A positive evaluation is given to micro-credit initiatives. These forms of business are considered by Benedict XVI one practicable way for the future of the financial

⁴⁵³ See above I, 3; IV, 2.

⁴⁵⁴ See A. VACCARO, A. J. G. SISON, Transparency in business: the perspective of Catholic social teaching and the ‘*Caritas in veritate*’, in *J. Bus. Ethics*, 100. 2007. 20 – 21.

⁴⁵⁵ See MCCANN, The principle of gratuitousness, in *J. Bus. Ethics*, 55 – 66. See also above IV, 3.

⁴⁵⁶ See also W. GRASSL, Hybrid forms of business: the logic of gift in the commercial world, in *J. Bus. Ethics*, 100. 2011. 117.

⁴⁵⁷ See A. K. SEN, *Development as freedom*. Oxford: Oxford University Press, 1999. 201.

⁴⁵⁸ *Caritas*, 65.

economy, or at least they represent a concrete and substantial action of the financial world, worthy of further institutional care and support. We can conclude that these initiatives appear to coincide with the social teaching of the RCC about ideal behaviour in the financial world.⁴⁵⁹

Two elements might be interesting for us if we want to briefly evaluate the reason for the success and the possibilities of these operations. First, the loan, or the general contribution, is given from a bank at the local level. There is, in other words, a reciprocal knowledge, between the bank, on one side, and the person who receives the money on the other. In this way the financial institution has also the possibility to better evaluate the real economic potential of its client.

The second element, probably the most important, is trust. In this kind of financial activity, where the one who usually receives the money is a poor person not able to furnish solid economic guarantees, there is a heavy reliance on what the client will do in the future. This might help to build in a more evident manner economic transactions upon reciprocal trust.

6. Economy of communion

We have seen the logic of gift according to *Caritas* and we have seen that Benedict XVI stresses that economic actions have moral consequences. We have also seen that in the theology of *Caritas* the expression ‘new humanistic synthesis’ calls for a new departure, leaving behind the contemporary economic crisis.⁴⁶⁰ Also, we have pointed out how the micro-credit can be a practice fitting the requirements of social teaching because it focuses on the social impact of its activities.

A question, then, might be: is there something in *Caritas* that proposes a specific practical implementation of these perspectives in the economic world? The economy of communion can be the answer:

When we consider the issues involved in the *relationship between business and ethics*, as well as the evolution currently taking place in methods of production, it would appear that the traditionally valid distinction between profit-based companies and non-profit organizations can no longer do full justice to reality, or offer practical direction for the future. In recent decades a broad intermediate area has emerged between the two types of enterprise. It is made up of traditional companies which nonetheless subscribe to social aid agreements in support of underdeveloped countries, charitable foundations associated with individual companies, groups of companies oriented towards social welfare, and the diversified world of the so-called ‘civil economy’ and the ‘economy of communion’.⁴⁶¹

We notice how Benedict XVI makes a step forward in respect to what the *Compendium* called ‘private non-profit organizations’.⁴⁶² In analysing the socio-economic reality he sees an emerging difference. If before the distinction was

⁴⁵⁹ See MCCANN, The principle of gratuitousness, in *J. Bus. Ethics*, 62.

⁴⁶⁰ See above VII, 1.1.

⁴⁶¹ *Caritas*, 46.

⁴⁶² PONTIFICAL COUNCIL FOR JUSTICE AND PEACE, *Compendium of the Social Doctrine of the Church*. Città del Vaticano: Libreria Editrice Vaticana, 2004. 357.

possible only between companies for-profit and companies not-for-profit, today we observe something new. It is a form of business that at first sight appears as a hybrid form.

The ‘economy of communion’ of which Benedict XVI is speaking about is substantially a multi-purpose company. Without excluding the private profit of the company, Benedict XVI sees the concrete option for a substantial part of the profits to be committed in the implementation of mutual and charitable initiatives.

Benedict XVI considers the economy of communion a good hope and a practicable alternative for the future of the economic setting.⁴⁶³ In this regard we should notice how in *Caritas* this way of enterprise is not understood as one that should replace the traditional one, but it is seen as one alongside traditional business.⁴⁶⁴ This makes the proposal even more realistic.⁴⁶⁵

We can say that the idea of an economy of communion as above outlined is not an original idea of Benedict XVI.⁴⁶⁶ Most likely he was influenced by Stefano Zamagni and Luigino Bruni, two Italian economists formed and influenced by the Franciscan economic theory and the Benedictine tradition. They have looked at the contribution that spirituality, charity and gratuitousness can make to economic development,⁴⁶⁷ focussing then on the charisma of Francis of Assisi and Benedict of Nursia.⁴⁶⁸ Bruni also sees in the Neapolitan eighteenth century tradition of Giambattista Vico and Antonio Genovesi enlightening insights for understanding the role of the market in creating relationships within the social context.⁴⁶⁹ Both economists are active in pursuing theoretical economic paths that have the characteristic of being socially sustainable and economically profitable. Their studies focus on the interpersonal character of the economic activity. The key words of their analysis are: reciprocity, gift, solidarity, sustainability and subsidiarity. These ideas are reflected in *Caritas* as the requirement of *civilizing the economy*⁴⁷⁰ through the ‘economy of communion’.⁴⁷¹

We also know that the Economy of Communion is the – economic – expression of the Focolare (hearth) movement, a religious movement within the Roman Catholic Church, founded by Chiara Lubich in 1943 in Trento, Italy.⁴⁷² On the economists just mentioned, Luigino Bruni also adheres to this movement.

The Economy of Communion was born from an idea of Chiara Lubich when she saw the misery of the *favelas* around Sao Paulo in Brazil during a journey in 1991. The idea was rather simple. She saw that the usual charitable activity was not enough among all that desolation for fulfilling the necessity of the poor. Thus, she thought to build a system involving the participation of competent business people to

⁴⁶³ See *Caritas*, 46.

⁴⁶⁴ See DORR, *Option for the poor and for the earth*, 377.

⁴⁶⁵ See DORR, *Option for the poor and for the earth*, 378.

⁴⁶⁶ See DORR, *Option for the poor and for the earth*, 375, 400.

⁴⁶⁷ See L. BRUNI, *Il prezzo della gratuità* Roma: Città Nuova, 2006. 11 – 21.

⁴⁶⁸ See L. BRUNI, A. SMERILLI, *Benedetta economia. Benedetto da Norcia e Francesco d’Assisi nella storia economica europea*. Roma: Città Nuova, 2008. 47 – 85.

⁴⁶⁹ See L. BRUNI, *Reciprocity, altruism and the civil society*. New York: Routledge, 2008. 14 – 21.

⁴⁷⁰ See *Caritas*, 38; MCCANN, The principle of gratuitousness, in *J. Bus. Ethics*, 65

⁴⁷¹ See GRASSL, HABISCH, Ethics and economics, in *J. Bus. Ethics*, 45.

⁴⁷² See C. LUBICH, Lezione per la laurea *honoris causa* in Economia e commercio, in V. MORAMARCO, L. BRUNI, eds., *L’economia di comunione*. Milano: Vita e Pensiero, 2000. 11 – 21.

realize an economy based on communion. In this system the business' profits are divided in three parts. One part is for the poor, for their most pressing needs. A second part is dedicated to the implementation of structures and possibilities for the formation of people inspired by the 'culture of giving'. These activities include education for new entrepreneurs, as well as for workers, through grants and the organization of courses. A third part is then re-invested in the company.⁴⁷³

The Economy of Communion wants to realize redistributive policies through the market. In this regard, an economy based on communion tries to enlarge the traditional perspective on the dual model of re-distribution, in which wealth is produced in the market, while the state operates if necessary to its re-distribution.⁴⁷⁴ In an approach like this the market is *civilized* by making it also the place for reciprocity and gratuitousness.⁴⁷⁵ Another decisive element of the Economy of Communion that coincides with what is proposed in *Caritas* is that not only the quality of the product is relevant, but also the quality of the productive process. In this sense the Economy of Communion proposes that the potential consumer will give a specific weight also to the *how* of the production process. This can be contrasted with traditional economic theory, according to which the consumer would always buy with the price as the main criterion.⁴⁷⁶ Instead, the Economy of Communion assumes that the consumer is interested in the production process of the good, for instance whether there were children involved or the general working conditions.

What can be said, then about the practicability of such a model, especially in the global context? The Economy of Communion proposes a model that can be suitable also outside the Focolare movement, and even outside the context of the Roman Catholic Church.⁴⁷⁷ This would mean to move from the Economy of Communion to an economy of communion. Such a possibility is concrete as far as solidarity and the concern for the other are shared.

⁴⁷³ See L. BRUNI, S. ZAMAGNI, eds., *Dizionario di economia civile*. Roma: Città Nuova, 2009. 333 – 334

⁴⁷⁴ See S. Zamagni, *Economia e relazionalità*, in Moramarco, Bruni, *L'economia di comunione*, 57 – 58.

⁴⁷⁵ L. BRUNI, *L'ethos del mercato. Un'introduzione ai fondamenti antropologici e relazionali dell'economia*. Milano: Bruno Mondadori, 2010. 167 – 168.

⁴⁷⁶ See S. Zamagni, *Economia e relazionalità*, in Moramarco, Bruni, *L'economia di comunione*, 59.

⁴⁷⁷ See DORR, *Option for the poor and for the earth*, 378; BRUNI, ZAMAGNI, *Dizionario di economia civile*, 344.

Chapter VIII – Subsidiarity, solidarity and ecology

1. Introduction

In this chapter we analyse the principle of subsidiarity and the principle of solidarity according to *Caritas in veritate*. We will observe whether Benedict XVI proposes a new theoretical understanding or application of these principles. Moreover, we will see how these two principles are considered fundamental for the implementation of a global authority in financial matters.

The discourse about business ethics in the previous chapter will be the basis for analysing here the topic of the environment's preservation. Upon this view, giving to economic actors a certain degree of responsibility for their actions is relevant both for the human beings and for their environment. This means that the moral discourse proposed in *Caritas* regards not only the strict economic context, but also the production and consumption of energy and other topics related to the natural environment.

2. The principles of subsidiarity and solidarity according to *Caritas in veritate*

We arrive now to discuss two concepts that we have previously examined through the *Compendium of the social doctrine of the Church*.⁴⁷⁸ These are the principle of subsidiarity and the principle of solidarity. Generally speaking, we will see that Benedict XVI remains attached to the perspective of the *Compendium*, for what regards their application. Namely, both the *Compendium* and Benedict XVI are convinced that the two principles are effective only when they come to be applied in a complementary way. A new element that we can observe in this discourse is that in *Caritas* the principle of subsidiarity is directly rooted in charity. The concept of subsidiarity is inscribed within the specific theological context of the Encyclical, where charity is the unifying force at the basis of social cohesion:

A particular manifestation of charity and a guiding criterion for fraternal cooperation between believers and non-believers is undoubtedly the *principle of subsidiarity* (see *Quadragesimo*, AAS 23. 203; *Centesimus*, 48; *Catechism*, 1883), an expression of inalienable human freedom. Subsidiarity is first and foremost a form of assistance to the human person via the autonomy of intermediate bodies. Such assistance is offered when individuals or groups are unable to accomplish something on their own, and it is always designed to achieve their emancipation, because it fosters freedom and participation through assumption of responsibility.⁴⁷⁹

In the perspective of Benedict XVI, the subsidiarity principle derives from the presence of charity in society.⁴⁸⁰ He defines the subsidiarity principle with the same

⁴⁷⁸ See above IV, 4 – 5.

⁴⁷⁹ BENEDICT XVI, *Caritas in Veritate*. Città del Vaticano: Libreria Editrice Vaticana. 2009. 57.

⁴⁸⁰ See *Caritas*, 57.

criteria as it is in the *Compendium*. The principle is explained as emerging from the autonomy of the citizens, in the sense that the people may interpret their own issues and may freely try to develop what appears to them to be the most effective solution.

In regard to this definition, Benedict XVI understands subsidiarity as an act of freedom. Through the intermediate bodies⁴⁸¹ comes a help to those persons which are alone unable to solve some specific matters alone. From the standpoint *Caritas* this kind of intervention through the intermediate bodies should always be a tempered help. It should be, ideally, a very balanced and careful intrusion in citizens' private environments to avoid any institutional oppression or submission of the individual freedom. So that, Benedict XVI specifies, the functioning of the principle of subsidiarity in regard to the members of society 'it is always designed to achieve their emancipation'.

2.1. Subsidiarity, solidarity and international co-operation for development

As usually happens in the explication of certain principles within the context of social teaching we observe how the single principle needs very often the complementary application of other principles to be fully understood and applicable.

In *Caritas* it is stated that to have an international process of development realized, without the exclusion of any social actor, subsidiarity has to be supplemented with solidarity. In Benedict XVI's view, this combination would avoid two risks. The first is social privatism; the second, a paternalist welfare assistance:

*The principle of subsidiarity must remain closely linked to the principle of solidarity and vice versa, since the former without the latter gives way to social privatism, while the latter without the former gives way to paternalist social assistance that is demeaning to those in need. This general rule must also be taken broadly into consideration when addressing issues concerning international development aid. [...] Aid programmes must increasingly acquire the characteristics of participation and completion from the grass roots. Indeed, the most valuable resources in countries receiving development aid are human resources: herein lies the real capital that needs to accumulate in order to guarantee a truly autonomous future for the poorest countries.*⁴⁸²

From this passage it is possible to see how Benedict XVI stretches the borders of the subsidiarity principle, moving from a delimited situation in which it regards a single state, to a larger international context, where the highest institutional level is a community or a group of states. The principle of subsidiarity applies in the same way also in this latter case. And Benedict XVI points out how subsidiarity and solidarity together could give their contribution to the world development when applied.

Upon this view, subsidiarity and solidarity must be present at the same time. Subsidiarity alone would provoke what Benedict XVI calls social privatism, a phenomenon caused by the absence of any institutional entity in governing socio-institutional processes. Social privatism can lead to the monopoly of private groups or association, excluding a public intervention even when necessary. On the other side, when solidarity becomes the unique and absolute value, it is possible that the

⁴⁸¹ See above I, 4.3.

⁴⁸² *Caritas*, 58.

assistance coming from a public institution does not leave any space for autonomous social initiatives of private citizens. In such a case, instead of being characterized by a moderate and balanced intervention, the public institution transforms the objective of a welfare community in a paternalistic Animal. All this brings to significant augmentation the typical problem that usually affects public assistance, namely the lack of specificity in the intervention.

When these criteria of subsidiarity and solidarity are well balanced, the ideal path that Benedict XVI foresees calls for a development of poorer countries that comes from the specific contribution represented, for instance, by the local products. In the end, the relation that there is between rich and poor countries should be remarked by the application of the subsidiarity and solidarity principles. The direct monetary and social help of the rich countries is not denied; indeed, it is still considered fundamental in his view.⁴⁸³ However, the measures to be taken should involve the authentic intention of the advantaged states to let others join their privileged situation. Countries on their way to development should be able to decide on their own the most favourable path towards the exit from poorness:

It should also be remembered that, in the economic sphere, the principal form of assistance needed by developing countries is that of allowing and encouraging the gradual penetration of their products into international markets, thus making it possible for these countries to participate fully in international economic life. Too often in the past, aid has served to create only fringe markets for the products of these donor countries. This was often due to a lack of genuine demand for the products in question: it is therefore necessary to help such countries improve their products and adapt them more effectively to existing demand. [...] Just and equitable international trade in agricultural goods can be beneficial to everyone, both to suppliers and to customers.⁴⁸⁴

A concrete measure that Benedict XVI desires to have implemented is allowing the products coming from disadvantaged countries enter the international markets. Benedict XVI states that this development aid has served in the past too often the interests of those who donated money with the end of creating market zones favourable only to them, and not to the poor countries involved.

We can argue that *Caritas* calls for an effective help in opening the possibilities for trade also for producers located in poor countries, with an eye to the particular characteristics of their products and to fairness in exchange, for instance, regarding the monetary value. Such an attitude calls, in the end, for the openness of all the operators in the socio-economic context that should see in the developing countries not so much competitors, but co-operators. On this level, indeed, co-operation involves also the sharing of educational knowledge and technological competence.⁴⁸⁵

Thus, in such perspective there are the two principles at work at the same time exactly as *Caritas* proposes. Subsidiarity is expressed at the level of the developing countries, in which there is freedom in choosing a specific and proper

⁴⁸³ See *Caritas*, 60.

⁴⁸⁴ *Caritas*, 58.

⁴⁸⁵ See A. VACCARO, A. J. G. SISON, Transparency in business: the perspective of Catholic social teaching and the '*Caritas in veritate*', in *Journal of Business Ethics*, 100. 2011. 23 – 24.

path. Solidarity comes from the developed countries that allow, encourage, and generally help, those countries in need on their way to the economic integration in the already organized global system.

2.2 Solidarity and the Roman Catholic view of Caritas in veritate

The principle of solidarity finds expression in *Caritas* also in its closing lines, where Benedict XVI proposes a view of the human global family inspired by the teaching of Jesus.

We have seen in a previous chapter how Benedict XVI considers particularly relevant the contribution from other religions for sustainable development, being in this view in line with the teaching of Vatican II.⁴⁸⁶ We can interpret this thought as his wish for a globalization that would be religious-inclusive. However, as is to be expected of a pope, the Roman Catholic perspective has priority, also in the concluding paragraphs of *Caritas*:

Christians long for the entire human family to call upon God as ‘Our Father!’ In union with the only-begotten Son, may all people learn to pray to the Father and to ask him, in the words that Jesus himself taught us, for the grace to glorify him by living according to his will, to receive the daily bread that we need, to be understanding and generous towards our debtors, not to be tempted beyond our limits, and to be delivered from evil (see Mt 6: 9 - 13).⁴⁸⁷

Therefore, Benedict XVI ends the Encyclical with the hope that all the people of the world can recognize God as ‘our father’, that they all will learn to pray with the prayer that Jesus taught to his disciples, recognizing God as the father of the human family.

In Benedict XVI’s thought, to recognize a father would mean also to recognize the people as brothers and sisters. Such a theological interpretation of the ‘Our father’ corresponds to what Benedict XVI wrote in his book about Jesus Christ. There, he underlined the relevance of individuating the fatherhood for the world, that in his idea makes easier the feeling of being a global family.⁴⁸⁸

We can notice how the theme of fraternity in a Christian theological perspective is definitely not new also in Ratzinger’s perspective.⁴⁸⁹ In proposing such a perspective we acknowledge how Benedict XVI sees the global family in coherence with what we have seen through the *Compendium of the social doctrine of the Church* about the global fraternal solidarity.⁴⁹⁰

⁴⁸⁶ See above VI, 3.

⁴⁸⁷ *Caritas*, 79.

⁴⁸⁸ See BENEDICT XVI, *Jesus of Nazareth. From the Baptism in the Jordan to the Transfiguration*. New York: Doubleday, 2007. 141 – 142.

⁴⁸⁹ See A. NICHOLS, *The theology of Joseph Ratzinger. An introductory study*. Edinburgh: T & T. Clark, 1988. IV.

⁴⁹⁰ See above IV, 5.

2.3. Subsidiarity and a world leading authority for the common good

The subsidiarity principle as treated in *Caritas* is not only presented by Benedict XVI as an expression of human freedom directed to the solution of social problems. It also is claimed to represent the best remedy towards a state that might consider itself capable of acting at all levels of society, thereby meddling inappropriately in its social foundations. Such public intervention, from top to bottom, often suffers the problem of the standardisation and abstractedness of the solutions proposed. This means that the intervention leaves aside all the particularities of the concrete situation that eventually need to be addressed with particular care and special instruments.

In such a theoretical framework Benedict XVI proposes the subsidiarity principle as the ideal basis for the building of a global authority able to manage problems related to the globalization process:

[...] the principle of subsidiarity is particularly well-suited to managing globalization [...]. Globalization certainly requires authority, insofar as it poses the problem of a global common good that needs to be pursued. This authority, however, must be organized in a subsidiary and stratified way (*Pacem*, AAS 55. 274), if it is not to infringe upon freedom and if it is to yield effective results in practice.⁴⁹¹

Two other elements have to be underlined here. The first regards the link that Benedict XVI makes between the subsidiarity principle and globalization. In his opinion the characteristics of the subsidiarity principle can fit the needs of a sustainable process of globalization. The second element worthy of attention is the appreciation that Benedict XVI makes for a globalization to be guided by a higher authority than that of the individual actors involved in the process.

Benedict XVI appears certain that globalization needs some degree of authority to direct human efforts towards the realisation of the common good. Such an authority will only work if the subsidiarity becomes its inspiring criterion. Benedict XVI uses the adjective 'certainly', referring to the need of a higher authority for better pursuing the common good at the international level. In his plea for an international authority, Benedict XVI brings forth a viewpoint that was introduced by John XXIII in the encyclical *Pacem in terris*.⁴⁹² Thus, a previous statement in social teaching is taken up in a contemporary standpoint, and accepted for the later state of affairs. Benedict XVI is inscribing his certainty about this topic in the traditional background of the social teaching.

The link made by Benedict XVI between the common good as an objective to pursue, and the need for a global authority for better doing that, rests on the same presupposition made almost fifty years ago by John XXIII. In the end, such a presupposition rests on simple logic: if the problem of the common good is related to a worldwide social level, instead of being related to a particular limited social context within national borders, this means the consequent necessary presence of a higher independent institution able to deal with moral, social and economical issues closely related to the achievement of the common good. In brief, there is the need of coordination at the global level.

⁴⁹¹ *Caritas*, 57.

⁴⁹² See JOHN XXIII, *Pacem in Terris*. AAS 55, 1963.136 – 137.

Following this reasoning, the consequence is that the social teaching of *Caritas* proposes in the same way the presence of the principle of subsidiarity together with the solidarity principle as a positive path to manage the uncertainty of the globalization process.⁴⁹³

In the previous section we have noticed how the appeal to co-operation made by Benedict XVI was, in a certain way, directed to the good will of the individual actors in the global economic context. Here, instead, we can notice how the claim is addressed towards a more institutional level.

Indeed, there has been a recent interest, in the context of social teaching, in addressing some global issues with a more ‘structural’ approach. This is the case of the Pontifical Council for Justice and Peace that has presented in 2011 a document called *Towards reforming the international financial and monetary systems in the context of global public authority*.⁴⁹⁴ In this document, the focus is on the building of a supranational entity with an authoritative character for regulating international financial transactions. The document quotes extensively both John XXIII and Benedict XVI⁴⁹⁵ as sources, thus providing the evidence of the doctrinal foundation of this idea in Roman Catholic social thought. Some have severely criticized this document including playing it down as coming from the ‘lower echelons of the Roman Curia’,⁴⁹⁶ others have recognized how ‘the vision in the document is underpinned by the Catholic principle of subsidiarity’.⁴⁹⁷

Economists like Joseph Stiglitz share standpoints similar to the one explored in *Caritas*. For him it seems obvious that ‘without comprehensive regulation, there will be regulatory evasion, [and] finance will go to the least regulated country’.⁴⁹⁸ Referring to the economic crisis of 2008, Stiglitz recognizes that notwithstanding the fact that the practices of many, but not even all, financial corporations remained within the law, there was a moral deficit in their actions.⁴⁹⁹

More generally, the establishment of a world authority is proposed in the sense of an institutional solution for the global malfunctioning of economics. About the specific issue of finance, Benedict XVI opts for the construction of a world authority, thus addressing the institutional and structural level of the problem.

Nevertheless, Benedict XVI, again, addresses directly also the economic actors in the financial system. In doing this, he refers to the previous teaching of John Paul II. Benedict XVI’s position morally criticizes those who take advantage of a too-liberal economic configuration in order to gain uniquely private profits and ignore the decisive role of financial investments for the common good:

⁴⁹³ See *Caritas*, 67.

⁴⁹⁴ Available online at:

http://www.vatican.va/roman_curia/pontifical_councils/justpeace/documents/rc_pc_justpeace_doc_20111024_nota_en.html

⁴⁹⁵ See *Caritas*, 67, and below IX, 4.2.

⁴⁹⁶ Quoted in D. DORR, *Option for the poor and for the earth. Catholic social teaching*. Maryknoll, NY: Orbis Books, 2012. 407

⁴⁹⁷ Vincent Miller quoted in DORR, *Option for the poor and for the earth*, 408.

⁴⁹⁸ See J. E. STIGLITZ, *Freefall. America, free markets, and the sinking of the world economy*. New York: W. W. Norton & Company. 2010. 216.

⁴⁹⁹ See STIGLITZ, *Freefall*, 278 – 281.

John Paul II taught that *investment always has moral, as well as economic significance* (see *Centesimus*, 36). All this - it should be stressed - is still valid today, despite the fact that the capital market has been significantly liberalized, and modern technological thinking can suggest that investment is merely a technical act, not a human and ethical one. There is no reason to deny that a certain amount of capital can do good, if invested abroad rather than at home. [...] What should be avoided is a speculative *use of financial resources* that yields to the temptation of seeking only short-term profit, without regard for the long-term sustainability of the enterprise, its benefit to the real economy and attention to the advancement, in suitable and appropriate ways, of further economic initiatives in countries in need of development.⁵⁰⁰

Benedict XVI stresses that profit that can be made through the means of finance can fit both the interests of financial investors and those of savers. He is convinced that the introduction of a more ethical approach within the framework of financial activities would not damage the financial systems, but will help it to growth both in developed and less-developed areas. This reflects indeed the general orientation of social teaching in regard to the moral concern that should be at the basis of economic action, according to which the moral demands would not damage at all the economic results of a financial activity, but rather will improve them indirectly, because they would improve the general social condition of the human beings involved.

Benedict XVI suggests that economic actors should prefer a long-term perspective, instead of the short-term.⁵⁰¹ It might be true that in the short-term the instant revenues might not appear satisfying in relation to the efforts made, but *Caritas* claims that if a long-term perspective is adopted, the benefit will regard both the life of the enterprise and the general well-being of the people where the financial investments are made.

3. Development and environment

We now move towards a slightly different topic, maintaining nevertheless a reference towards the general concepts of sustainability, solidarity and the human person according to social teaching. We are going to consider what we may call a theology of the environment or an ecological theology, eco-theology as puts it.⁵⁰² These terms may sound new at this point of the analysis, but the theme is not totally new in the social teaching of the Roman Catholic Church. First traces of the interest in environmental issues from the Roman Catholic hierarchy came during Vatican II, in the context of the new relation between the RCC and the world envisaged in *Gaudium*.⁵⁰³ Paul VI's *Octogesima adveniens*, in 1971, also started to evaluate the consequences of human actions for the environment.⁵⁰⁴ A specific and concrete

⁵⁰⁰ *Caritas*, 40.

⁵⁰¹ See W. GRASSL, Hybrid forms of business: the logic of gift in the commercial world, in *J. Bus. Ethics*, 100. 2011. 112.

⁵⁰² See DORR, *Option for the poor and for the earth*, 432.

⁵⁰³ See S. MORANDINI, *Nel tempo dell'ecologia. Etica teologica e questione ambientale*. Bologna: EDB, 1999. 66.

⁵⁰⁴ See C. DEANE-DRUMMOND, Joining in the dance: Catholic social teaching and ecology, in *New Blackfriars*, 93. 1044. 2012. 195.

acknowledgement of the relevance of the ecological topic, together with a theological foundation for this argument, came with John Paul II in 1979, in his first encyclical *Redemptor hominis*.⁵⁰⁵ Concern for the environment has come to be involved in all the theological speculation about the role of the human being as a creature in the created world.

On the secular side the debate about the environment during the sixties and seventies of the twentieth century was stimulated by the knowledge of the damage that industrial pollution could cause. There was a new understanding of the environmental issue because there was the fear and awareness that some damages to the environment could cause the permanent loss of a natural good. In this sense the problem has been interpreted as an urgent and typical modern, and contemporary, issue also in the historical perspective of Hobsbawm about the twentieth century.⁵⁰⁶

Caritas claims to provide an adequate framework for interpreting this topic, due to the similarity with some concepts we have examined previously. Relevant concepts in Roman Catholic theology and social thought are the common good, the universal destination of goods, and the creation of the human being in God's image. Ecological issues involve the whole set of notions about the responsibility for the created world that are at the basis of the social doctrine's ideas on the economic organization of society.

Benedict XVI offers a discourse in which, while relating the discussion about development with the environmental issue, the central focus remains on our role as receivers of the gift of the created world by God.

This position that the human being holds in Christian teaching, Benedict XVI claims, should be regarded as the beginning of any serious reflection about our responsibilities for the environment.

We notice how this idea rests on the theological elaboration initiated by Paul VI and then consistently developed by John Paul II. The main elements in the previous popes that we find common to Benedict XVI's perspective are the responsibility of humanity towards creation as coming from God's mandate and the dangers that the exploitation of the natural environment for short term accumulation can cause.⁵⁰⁷

The fact that we are creatures and that God freely gives us the created world implies that we need to think about the relevance of our natural environment and our role of administrators in it. In fact, Benedict XVI states, when we ignore that God created us, and that we are also part of the natural system, we are losing sight of the respect that is due to the natural environment:

Today the subject of development is also closely related to the duties arising from *our relationship to the natural environment*. The environment is God's gift to everyone, and in our use of it we have a responsibility towards the poor, towards future generations and towards humanity as a whole. [...] In nature, the believer recognizes the wonderful result of God's creative activity, which we may use responsibly to satisfy our legitimate needs, material or otherwise, while respecting the intrinsic balance of creation. If this vision is lost, we end up

⁵⁰⁵ See DEANE-DRUMMOND, *Joining in the dance*, in *New Blackfriars*, 198.

⁵⁰⁶ See E. J. HOBSBAWM, *The age of extremes. The short Twentieth century 1914 – 1991*. New York: Pantheon Books, 1994. XIX. 3.

⁵⁰⁷ See DEANE-DRUMMOND, *Joining in the dance*, in *New Blackfriars*, 195, 197, 203.

either considering nature an untouchable taboo or, on the contrary, abusing it. Neither attitude is consonant with the Christian vision of nature as the fruit of God's creation.⁵⁰⁸

Benedict XVI understands nature as something that is created by God out of the love for human beings. In his theology he claims that such a creation deserves the maximum of care, and humanity is called to make use of nature for his needs, but at the same time should act to preserve it. Human beings should respect its rhythms and balances. This attitude outlined in social doctrine, that may be seen as a proper 'administration of goods', has been described as 'stewardship', and goes parallel with the 'partnership' with the rest of creation.⁵⁰⁹

This discourse presents social thought's view about the created world and puts humanity as a whole at the centre of God's plan. In fact, the human being is considered here the principal administrator that can control this inheritance. This causes the possibility for human beings to properly use the natural resources that may come from creation. Human beings can abuse their responsibility as administrators in exploiting without any care what they have at their disposal. It is in regard of this latter possibility that in *Caritas* Benedict XVI notices two risks. One concerns an exasperated and radical naturalism, or extreme environmentalism, that may arise when nature is placed at a higher level of importance than the human being. The other, on the opposite side, concerns an excessive exploitation of the resources that nature offers without concern for the generations that will come in the future.⁵¹⁰

Ultimately, *Caritas* calls for a balanced attitude towards the use of natural resources, in this regard Benedict XVI already prospected a necessary shift in lifestyles that are dangerously oriented and rooted in consumerism.⁵¹¹ If we literally pillage the environment around us we are probably determining a development based on the misuse and abuse of resources and people, while its ultimate end would be concerned uniquely with finding other ways for the exploitation of new resources.

4. Responsibility, energy and human ecology

The discourse on development and the preservation of the natural environment calls for the consideration of the energy problems of our time. There is indeed a concrete risk about contemporary society using a huge part of natural resources with disastrous consequences for future generations. In the perspective proposed in *Caritas* this is a concrete risk, but it is possible to avoid this risk.

The depletion of natural resources and global warming has acquired its specificity and popularity outside the theological context of RC social teaching. The discourse about nature in *Caritas* is influenced by the relevance that ecological topics have in the contemporary public and academic debate.

⁵⁰⁸ *Caritas*, 48.

⁵⁰⁹ See DORR, *Option for the poor and for the earth*, 437.

⁵¹⁰ See *Caritas*, 48; DORR, *Option for the poor and for the earth*, 434 – 435; DEANE-DRUMMOND, *Joining in the dance*, in *New Blackfriars*, 208.

⁵¹¹ D. A. FARBER, *Sustainable consumption, energy policy, and individual well-being*, in *Vanderbilt Law Review*, 65. 2012. 1499 – 1500.

On natural environment, Benedict XVI focuses the attention on a notion that was introduced in social teaching by John Paul II. This is the concept of ‘human ecology’.⁵¹² The adjective ‘human’ related to the noun ‘ecology’, aims to delineate an ecology not uniquely environmental, but specifically ‘human’. We may also say that human ecology would include the more specific environmental ecology within it.

This human ecology so characterised includes also other elements that may affect the life quality of the human beings. Obviously the concern for environmental problems remains crucial. In addition to this concern there is a more general cultural and moral issue. The concept of human ecology, in this sense, is also related with that of the integral human development, where the adjective human regards all the cultural aspects that belong to the sphere of humanity, and that should be fulfilled in an integral way.⁵¹³

Throughout the whole of social thought until *Caritas*, this element of interrelation among diverse sciences and now different human realities persists. This character of interrelation that pervades the intellectual atmosphere of Benedict’s XVI theology is often expressed within the text of *Caritas*. Also when speaking about human ecology Benedict XVI defines the relation between a morally healthy society and a good preservation of the natural environment as follows:

There is need for what might be called a human ecology, correctly understood. The deterioration of nature is in fact closely connected to the culture that shapes human coexistence: *when ‘human ecology’ (Centesimus, 38; 40th World day of peace 2007, 8) is respected within society, environmental ecology also benefits. Just as human virtues are interrelated, such that the weakening of one places others at risk, so the ecological system is based on respect for a plan that affects both the health of society and its good relationship with nature.*⁵¹⁴

There is, in the idea of Benedict XVI, a reciprocal influence between the moral world on one side, and the ecological one on the other. At this level the bond between economic development and ecological issues appears to be more tight.

The care we have for the natural resources of the world is determined by the care we have for ourselves, as human beings, in our everyday social life. And in the reverse direction the natural environment around us may influence our self-conception. That is to say that growing up in an environment where wasting and indiscriminate polluting is common, might cause less respect also for human beings. And, the opposite, a culture where the respect for the environment is taken seriously in all its aspects, would also help the moral growth of the human beings in it.

This is the meaning of a human ecology in the social thought. It is the ecology of the human being, which affects the person’s wholeness, considered also as part of a natural system to be preserved.

We are going to see now how Benedict XVI concretely faces the energy problem. In the context of social teaching the problems related with the production and consumption of energy fall in the same order of principles as those that regard wealth production and distribution, namely, energy should be shared. Benedict XVI addresses both public and private entities, as the actors that should start a changing process in the use of natural resources for producing energy:

⁵¹² See DEANE-DRUMMOND, *Joining in the dance*, in *New Blackfriars*, 202.

⁵¹³ See *Caritas*, 48.

⁵¹⁴ *Caritas*, 51.

Questions linked to the care and preservation of the environment today need to give due consideration to *the energy problem*. The fact that some States, power groups and companies hoard non-renewable energy resources represents a grave obstacle to development in poor countries. Those countries lack the economic means either to gain access to existing sources of non-renewable energy or to finance research into new alternatives. The stockpiling of natural resources, which in many cases are found in the poor countries themselves, gives rise to exploitation and frequent conflicts between and within nations. [...] The international community has an urgent duty to find institutional means of regulating the exploitation of non-renewable resources, involving poor countries in the process, in order to plan together for the future.⁵¹⁵

We can see how the accumulation of energy resources for personal use or profit is seen in *Caritas* exactly similar to the way social thought saw the accumulation of financial capital in few hands without the intention of serving the common good. Such a development is, in Benedict XVI's view, deplorable. Even more regrettable is it when powerful entities hold a privileged position in producing energy in the non-developed and poor countries where the energy source comes from, without supporting in any way the growth of those countries.

Caritas makes an appeal towards private entities, like the corporations of the energy sector that should remember their role as agents for the common good, and to the main public international institutions and organizations, which are charged with building a legal framework able to avoid the easy exploitation of natural resources at the expense of the environment and of indigenous populations.

What was said here needs to be integrated with one more consideration. Not only energy needs to be shared but it also needs a sustainable employ and production, capable of guaranteeing the same access to energy for all countries. As we know that certain sources are non-renewable, Benedict XVI points out that there must be a strong focus on research into alternative sources of energy together with their sustainable use.⁵¹⁶ What *Caritas* seeks is a renewed solidarity that should pervade the relationship between developed and non-developed countries. It is, again, primarily a claim for international agreements and institutions that should set a legal framework in which energy resources are not seized by a few entities, public or private.

Benedict XVI sets a lofty goal for the international community, which is charged with the responsibility of working towards a fair use of natural resources. Notwithstanding these considerations, it has been pointed out how in *Caritas*, Benedict XVI still speaks too general on specific and systematic changes that are necessary, especially regarding the attitude of those countries that consume far more energy than average.⁵¹⁷

⁵¹⁵ *Caritas*, 49.

⁵¹⁶ See *Caritas*, 49.

⁵¹⁷ See DEANE-DRUMMOND, *Joining in the dance*, in *New Blackfriars*, 204.

Chapter IX – Concluding remarks

Introduction

Benedict XVI's encyclical letter *Caritas in veritate* (2009) is mainly about social and economic issues. In this regard, it is a further step in the tradition of the social teaching of the Roman Catholic Church. Though the moral norms developed in more than two thousand years of Christian wisdom, social doctrine is a modern concept. Especially since the years of the Second Vatican Ecumenical Council (1960s), the social teaching 'has grown stronger, deeper, and clearer.'⁵¹⁸

The core of this work, its second part, is an analytical and interpretative study of *Caritas*. In this encyclical one may find the perspective of Benedict XVI, the highest authority in the Roman Catholic Church, about some of the most relevant socio-economic issues of our time. To understand *Caritas* one needs to understand its terminology. Terms such as 'integral human development' draw upon the tradition of social doctrine. The first part of my work, served to introduce the reader into social doctrine and its specific terminology.

One may notice that even though Benedict XVI speaks extensively about the 'common good' or the 'human person', in *Caritas* there is no clear definition of these terms. To evaluate the content of *Caritas* it is necessary to have some knowledge of the tradition that is behind it. My work may be a contribution to the comprehension of Roman Catholic social thought, because here I have tried to give both the basic interpretative tools and the analytical content. These two elements combined may give to the reader a better access to understand the ideas of Benedict XVI from the standpoint of this Pope. With better understanding comes the possibility to evaluate and criticize the social teaching.

Key issues and research questions

In the introductory chapter of this study, three key issues necessary for an adequate understanding of the encyclical were raised. Firstly, it was considered important to understand the nature and authoritative standing of an encyclical and of 'social doctrine'. Secondly, to understand the encyclical *Caritas in veritate* one needs to have a sufficient understanding of previous contributions to the social doctrine of the Roman Catholic Church. And thirdly, to understand the encyclical one needs to consider it in its contemporary context. This contemporary context includes the theological vision of Benedict XVI (and of his earlier gestalt as cardinal Ratzinger), secular discourse and scholarship on these issues, and the contemporary situation in the world at large. From these key issues, especially the second and the third, in the Introduction of this study some typical questions for research were posed: to what extent is the encyclical *Caritas in veritate* continuous with earlier pronouncements? To what extent is it new? In as far as there are new elements, can these be understood in relation to the theological thought of Joseph Ratzinger, who became pope Benedict XVI? To what extent can the specific points of view present in *Caritas in veritate* be seen as responses to contemporary social and economic developments such as globalization, or to new insights in the human sciences and contemporary secular thought?

⁵¹⁸ See D. DORR, *Option for the poor and for the earth. Catholic social teaching*. Maryknoll, NY: Orbis Books, 2012. 466.

In this concluding chapter, within the following paragraphs, starting from Benedict XVI's theological vision as presented in *Caritas*, we will then address the three key issues including answers to the research questions.

The theological vision of Caritas in veritate

Benedict XVI considers the economic crisis as 'an opportunity for discernment, in which to shape a new vision for the future'.⁵¹⁹ Thus, the discourse presented in *Caritas* has to be seen as a socio-economic alternative coming from a religious tradition that aims to say something that can be shared from people, religious and non-religious, in the global perspective.

In *Caritas* Benedict XVI makes some concrete proposals, for instance calling for a supranational authority able to counter the dysfunctions of the financial system in the global economy,⁵²⁰ and for an 'economy of communion', that is, an economy with companies that integrate social values and profit-making, co-existing with companies that are primarily profit-oriented.⁵²¹ This moment of crisis, as Benedict XVI thinks, furnishes exactly the opportunity to discuss, develop and implement new ways that can help us to come out from the contemporary economic crisis and develop a more just global socio-economic system.⁵²²

This being said, we notice how the Encyclical shows a theological foundation. A clear example of this can be found in the closing lines of *Caritas*, that we have previously analysed in the part regarding the principle of solidarity.⁵²³ We can look at that passage as an eminent example of the theological foundation of Benedict XVI's social thought. Notwithstanding the fact that humanity as a global family is a view that can be shared even without a theological basis, we see that in *Caritas* Benedict XVI finds inspiration in a theological source, that is the interpretation of Jesus' words. The core is the relationship of each individual human person with God, the primacy of God's gift of love to all persons. This core has various consequences, which might be spoken of as universal, individual, and transcendental.

Caritas expresses the hope that all the people of the world will come to recognize God as the father of the human family. This has a universal horizon; it encompasses all human persons. And it has immediate moral implications: to recognize God as our common father would mean also to recognize all the people as our brothers and sisters.

Another theological concept that throughout the analysis of *Caritas* can give us the insight of an encyclical with a theological foundation is the concept of the human being as created in God's image. We have already seen the consequences of this idea on the socio-economic view prospected in *Caritas*,⁵²⁴ but we now look at it as a confirmation of the solid theological basis that Benedict XVI wanted to give to its work.

⁵¹⁹ BENEDICT XVI, *Caritas in Veritate*. Città del Vaticano: Libreria Editrice Vaticana. 2009.21; see above VII, 1.

⁵²⁰ See VII, 2.3.

⁵²¹ See VII, 6.

⁵²² See VII, 1.1.

⁵²³ See VIII, 2.2.

⁵²⁴ See, for instance, VII, 5.

The core – each individual person receiving God’s love and being allowed to respond to this love – aligns well with a certain ‘individualism’ and ‘personalism’ in the position developed in *Caritas*. The main call is upon each individual to be moral (understood in this relation to God and fellow humans) in their own particular setting; solidarity is to be shown by individuals. An example is the discussion on business ethics, which is very much about the orientation of individual actors – even if they then get together to organize businesses that have a social nature.⁵²⁵ There is no rejection of organizations, even up to the level of a transnational authority, but such more encompassing forms of organization are only justified when needed for the purposes at hand. Subsidiarity – dealing with issues at the lowest possible level – is the guiding principle.⁵²⁶

The human-centred theology shows itself also in its understanding of the environmental issues. Though the created order is God, it is understood as God’s gift to humans, not for exploitation, but as context for human integral development. Thus, the typical expression on ecology is ‘human ecology’.⁵²⁷

Last but not least, the theological core expresses itself in the criticism of an exclusive material orientation and consumerist mentality. As human persons in relation to God, the ultimate aim (the common good) transcends such a material horizon; the ‘integral’ in human integral development points to such wider moral and spiritual concerns.⁵²⁸

All in all, though *Caritas* is a document about social and economical affairs, it has an outspoken theological foundation. Furthermore, it is a Roman Catholic theology that furnishes these basic theological pillars.

The theological foundation of *Caritas* might be seen as the source of misunderstandings in the dialogue between the Roman Catholic Church and the secular world. Namely, if the socio-economic considerations of *Caritas* are coming from a theological interpretation of ‘revealed words’, how is it possible that they fit with the complex and evolving reality? A possible answer to this question is in the consideration of the nature of the Encyclical as part of the social doctrine of the Roman Catholic Church.

First key issue: the nature of an encyclical on social doctrine

One potential misunderstanding regards the nature of an encyclical. It should be emphasized that papal statements are important, but not all papal statements are equal in kind and status.⁵²⁹ An encyclical is to be understood as a pastoral letter. Traditionally, such letters were addressed at the bishops. *Caritas* is addressed not only at the bishops, but also at priests and deacons, men and women religious, the lay faithful and all people of good will’.⁵³⁰ This inclusion of ‘all people of good will’ can be found in social encyclicals since John XXIII.⁵³¹ By choosing to be so inclusive, the popes have made clear that these encyclicals are not to be seen as documents that

⁵²⁵ See VII, 5.

⁵²⁶ See VIII, 2.1.

⁵²⁷ See VIII, 4.

⁵²⁸ See VI, 3.

⁵²⁹ See II, 2.1.

⁵³⁰ See VI, 2.

⁵³¹ See III, 5.

deal with topics internal to the Roman Catholic Church and that the common good envisaged is to be inclusive as well. In this case, the letter deals with social, economic and ecological themes of our time.

The encyclical letter is not directly about matters of faith, such as the understanding of dogmas. As a pastoral letter, an encyclical is offering guidance or advice in the world of today. It is not a dogmatic pronouncement, and does not have a claim to ‘infallibility’. Though not to be given too much weight, an encyclical is, of course, an important document, that is supposed to be taken very seriously. It presents itself as a letter from the current pope, but is set in the context of the overarching tradition. Thus, legitimacy is claimed by the biblical and theological framework, as well as by the overwhelming amount of references to previous encyclicals, papal messages, and documents of the Second Vatican Council. It is not a letter from an individual, but a letter that carries the authority of the papacy, and in which the specific view presented is acknowledged as open to dispute, and still has to make its case by convincing and inspiring people.

Second key issue: continuity? Caritas in veritate and the tradition of Roman Catholic social thought

By including extensive references to previous encyclicals since 1891 and to other documents of social thought, Benedict XVI presents *Caritas* as standing in continuity with that tradition.⁵³² Regarding the theme of global economic development and social justice, most references regard pope Paul VI (1963 – 1978). References to Benedict’s immediate predecessor John Paul II (1978 – 2005) often have to do with pastoral and theological aspects, and also with concern about the environment.⁵³³ The documents of the Second Vatican Council (1962 – 1965) and the encyclical *Pacem in terris* of John XXIII (1958 – 1963) are probably the sources of the general atmosphere in *Caritas*.

Though there is much continuity, specific to *Caritas* may be the focus on the consequences of globalization, both with respect to economic development and with respect to ecological problems of our time. *Caritas* can add something to previous social teaching in giving a special global accent that Benedict XVI believes will be central from now onwards.

Since the 1960s, ‘social thought’ has caused some division in the Roman Catholic Church as well. The ‘liberation theologians’ have called for a strong commitment, arguing that it is especially by engaging with the poor that one may understand the message of the Gospel. Though some of the terminology has entered the vocabulary of the successive encyclicals, including this one – the strong emphasis on love and justice as intimately connected, on integral development and global fairness may serve as key examples –, Benedict XVI’s encyclical has not taken as outspoken a political stance as advocates of liberation theology might have hoped for.⁵³⁴ There is in the encyclical a strong focus on the individual person, and thus more a tendency to stress the morality of individuals than the struggle against oppressive structures. In this, there is in *Caritas* adherence with the tradition of the

⁵³² See, for instance, VI, 3.

⁵³³ See VIII, 3.

⁵³⁴ See VI, 2.3.

Roman Catholic personalism.⁵³⁵ On the other hand, Benedict XVI has stressed development and justice, and suggested that the establishment of a supra-national authority might be needed to control the international financial and economic markets. With this plea for a supranational authority, *Caritas* drew criticism from ‘the right’, especially from advocates of a free market economy (especially in the USA).⁵³⁶ The unwillingness to support explicitly a political side may have caused concern among those, on the left and the right, who expect that the Roman Catholic Church joins this or that cause.⁵³⁷

Though the encyclical, in line with almost all previous social doctrine, abstains from a specific political stance, it does in its principles give good grounds for the religious engagement with justice that drives the liberation theologies of the last decades. This may be seen as remarkable, as in his pre-papal status, cardinal Ratzinger was the Prefect of the Congregation for the Doctrine of the Faith that in the 1980s produced strong criticism of liberation theologians. As pope Benedict XVI, he has endorsed these documents again and repeated his concern for ‘marxism’ and direct political activity by priests.⁵³⁸

Notwithstanding such disagreements in the dialogue between ‘local’ theologies of liberation and the ‘official’ theology of the Roman Catholic Church, some optimism may be based on the recent appointment of Gerhard Ludwig Müller as Prefect of the Congregation for the Doctrine of the Faith.⁵³⁹ This choice made by Benedict XVI as a ‘pope’, which differs from the approach he took as ‘cardinal’, might open new opportunities for a constructive relation among theologians and among theologies that all seek ‘the common good’ in the political, social and economic context.

A new emphasis: ecology

Looking back at this research I think that one can consider *Caritas* to be in line with previous social teaching. I think that it is possible to recognize that Benedict XVI’s encyclical is a piece of social thought in line with the tradition of the Roman Catholic social thought.⁵⁴⁰ This can be concluded not only on the basis of the many references that Benedict XVI makes in his work, but also from the analysis of the content as such. From this latter consideration, nevertheless, it arises also the acknowledgement that something new there is in *Caritas*. This is the attention that Benedict XVI gives to the environment and to sustainability of our progress in relation with the phenomenon of globalization. This is both a strength and a weakness.

From one side, as a *strength*, by being open to new issues *Caritas* stands in the tradition of affirmation and development that we have previously encountered.⁵⁴¹ Globalization and the environment were not totally ignored by previous social

⁵³⁵ See IV, 2.

⁵³⁶ See DORR, *Option for the poor and for the earth*, 394 – 396.

⁵³⁷ See DORR, *Option for the poor and for the earth*, 449 – 450.

⁵³⁸ See DORR, *Option for the poor and for the earth*, 387, quoting a speech of Benedict to bishops in Brasil, delivered December 5, 2009; and above VI, 2.3.

⁵³⁹ See above VI, 2.3.

⁵⁴⁰ See in this sense also P. K. TURKSON, *Conclusions: Caritas in veritate in the tradition of Catholic social thought*, in D. K. FINN, ed., *The Moral Dynamics of Economic Life: An Extension and Critique of Caritas in Veritate*. Oxford University Press, New York 2012.

⁵⁴¹ See above II, 2.

teaching, especially that of Paul VI and of John Paul II. In *Caritas* the ecological theme is integrated into the theological and moral framework (e.g. the notions of ‘God’s gift’, ‘integral human development’, ‘human ecology’), rather than a separate issue. This integration of new themes, or at least of the place it receives, may give to the teaching stability and coherence through time, and provide a stable platform for the ecumenical dialogue.⁵⁴² At the same time, in *Caritas*, these topics are addressed in a way that deals both with the terminology and the content of more secular sensibilities about the environment and globalization of the economy. The global accent and the environmental preoccupation of Benedict XVI in *Caritas* represent ‘renewal’. The strength is given by an attitude that does not refuse to update the content of social teaching with contemporary issues. This renewal is demanded given that social thought is an answer to the social questions of our time.

A *weakness* might be an unnecessary uneasiness in allowing some topics to enter the themes of social teaching. Especially for what regards the ecological issues, the social doctrine lacks specificity in outlining for its audience a clear and proper attitude. It is not that social doctrine lacks theological foundations for developing an ecological discourse, but if it were more effective among Roman Catholics in the world, more results in terms of environmental preservation might perhaps be noticed. More emphasis could have been given towards recycling. More interest could have been shown in, and more support given for, research on alternative and renewable energy sources. And the ecological theme is intrinsically related to the economic one: more concern could have been expressed about attitudes devoted to the accumulation of money and goods, instead of the sharing of money and goods. More openness could be proposed towards alternative, traditional or new, ways of handling property and re-distribution. More analytical arguments regarding all these topics should be included in the social doctrine to make it more effective.

The instant gratification of the individual, intended as the need of consuming, immediately satisfied with the act of purchasing, can be considered as a distinctive trait of the economically developed parts of the world. The Westernized world has been able to produce material wealth and stability in the access to the means of sustenance. Material needs are also primary needs, thus this can be considered a success. Nevertheless, social teaching would not speak of a general well-being as given from the sum of the individual material satisfaction. And because of this, in the end, it should be put more emphasis on new-life-styles that break with certain behaviours of the past.

Third key issue: Caritas in veritate in the contemporary world

The specific setting of *Caritas* is not just that this is the first social encyclical of a new pope, but also that it appears in the midst of a major economic crisis. The publication of *Caritas* has been delayed due to new elements that the economic crisis was presenting, making a re-thinking of certain arguments necessary.⁵⁴³ This crisis has been interpreted by the social teaching of Benedict XVI also as an opportunity for building a new social framework, an occasion for organizing the global society according to its global needs. In this direction goes the proposal for a

⁵⁴² See DORR, *Option for the poor and for the earth*, 456.

⁵⁴³ See J. M. BREEN, *Love, truth and economy. A reflection on Benedict XVI's Caritas in veritate*, in *Harvard Journal of Law and Public Policy*, 33. 2010. 991.

world leading authority for the financial world.⁵⁴⁴ This is an example of the social doctrine's approach to the global issues, but here, it serves us for reflecting about another tension. Namely, the social doctrine of the Roman Catholic Church aims to propose principles, solutions and approaches to the problems that are supposed to be effective worldwide.

We may consider this global ambition a *strength* of the social teaching. The same ideals are to be valid everywhere. This fact avoids internal contrasts in the development of the teaching. To be universal is also a good contribution in the ecumenical and interreligious dialogue, and it simplifies the dialogue with social sciences.⁵⁴⁵ There are, indeed, values and principles that can be shared globally. Principles such as the recognition of the intrinsic and transcendental dignity and freedom of each individual human being, the pursuing of the end of the common good, and the consequential universal destination of goods, are principles that might work and be applied also beyond the Western culture.

From another side, a *weakness* arises when social teaching faces the complex reality. The social doctrine of the Roman Catholic Church has to face many different contexts, as many as the places where the Roman Catholic Church is present. The tension between the homogeneous proposal of the social doctrine in the global perspective and the local situations is the source of some problems. As the debate around the liberation theology can show, local contexts may need diverse local approaches. In the will of preserving its traditional vocation, the Roman Catholic Church should be able to differentiate in methods, aims and approaches according to local realities. This should be balanced with the interrelated global proposal that social thought aims to present. In the end, this new attitude calls for a *glocal* perspective on the social issues of the world.

Caritas in veritate and secular thought

Not only is *Caritas* an engagement with the global economic and, to a lesser extent, ecological crisis, but it is also an engagement with secular thought on these issues. This is less explicit, but shows through in the analysis of *Caritas*.⁵⁴⁶

When the social doctrine referred to the contributions of different sciences I have tried to see what can be the shared standpoints in some secular fields. As economic globalization is a central theme in *Caritas*,⁵⁴⁷ I have pointed towards those authors, economists, philosophers and sociologists, who also maintain in their work a strong focus on globalization and justice. These authors share some ideas with Roman Catholic social teaching, for instance a possible re-evaluation of the wealth measuring parameters, GDP,⁵⁴⁸ or the plea for a world leading financial authority.⁵⁴⁹ This sort of compatibility between secular thinkers and the official social doctrine, may encourage the Roman Catholic Church to be open to the involvement of lay

⁵⁴⁴ See above VIII, 2.3.

⁵⁴⁵ See VI, 3.

⁵⁴⁶ See, for instance, above VII, 2.

⁵⁴⁷ See L. CAMPIGLIO, *Verso un'economica globalmente responsabile*, in F. G. BRAMBILLA, L. CAMPIGLIO, M. TOSO, F. VIOLA, V. ZAMAGNI, *Carità globale. Commento alla Caritas in veritate*. Città del Vaticano: Libreria Editrice Vaticana, 2009. 79.

⁵⁴⁸ See above, VI, 2.2.2.

⁵⁴⁹ See above, VIII, 2.3.

people and specialists from all the fields in developing a better social doctrine to be implemented for a better world.⁵⁵⁰

The consideration of the 'Economy of Communion' can be considered a positive example. We have seen how Benedict XVI has welcomed in his social teaching this particular way of understanding the economic interactions proposed by the Focolare movement, seeking the creation of businesses that combine an interest in profit with a social agenda. Indeed, the 'economy of communion' can be seen as a concrete proposal able to build 'a more human model of economics'.⁵⁵¹

We have also seen that Benedict XVI has asked technical help in preparing the Encyclical,⁵⁵² in a certain way putting into practice the proposal for a wider perspective on socio-economic issues.

To understand the encyclical, it is necessary to understand the language and concepts. As it has been pointed out before, to a large extent these derive from previous encyclicals and other documents in Roman Catholic social thought. This is obvious, as the text of the encyclical comes with 159 endnotes referring to these documents. Though not explicit, it turns out to be also necessary to pay attention to elements that may have their origins elsewhere, be it among lay movements within the Roman Catholic Church (e.g. Focolare), be it among scientists and scholars, both Catholic and non-Catholic.

From one side, as a *strength*, the social doctrine is open to the contribution of secular sciences. The Roman Catholic Church claims for the independence of all the sciences in pursuing their results.⁵⁵³ It is then in a second moment that social teaching may acquire certain scientific results and integrate them. The social doctrine aims to be interdisciplinary. It aims to dialogue with all the sciences with the objective of finding, when possible, a *humanistic synthesis*. We observe how behind the proposal of social teaching there are considerations about the socio-economic world that come from scientific studies.

From the other side, anyhow, emerges a *weakness*. To be open, in the sense prospected above, means to maintain a level of generality and abstractedness that can generate incomprehensibility. The ground of social teaching remains a theological one; its authority is thus not supported by references to secular, scientific literature, but to earlier statements of the leadership of the Roman Catholic Church. The interdisciplinary attitude might expect that one places theological issues next to, for instance, economic issues. However, preserving the theological ground as the solid basis of the social doctrine may cause a less effective penetration of the secular scientific discourse inside the themes of the social doctrine. An answer to this difficulty might come from the analysis and evaluation of social thought's claims without referring to their theological basis. In a phase of evaluation of social thought's claims, and while comparing the proposals of social teaching with those coming from the human sciences, it is possible to temporarily leave apart the theological foundations of social teaching. In other words, there is the possibility that even without sharing the theological basis of social thought, its aims and proposals can still be considered helpful and valid.

⁵⁵⁰ See DORR, *Option for the poor and for the earth*. 465 – 466.

⁵⁵¹ See DORR, *Option for the poor and for the earth*, 457.

⁵⁵² See VII, 2.

⁵⁵³ See, for instance, II, 2.

A message for all

What might appear to be something specific to the encyclical is that the Roman Catholic criticism of some secular standpoints is based primarily on theological considerations. It is from a theological framework that the moral structure is developed. This moral system is eminently Christian, and specifically Roman Catholic. And even if it is not excluding what in the moral message from other religions might coincide with the Roman Catholic doctrine,⁵⁵⁴ it definitely remains a proposal marked with the Roman Catholic heritage in interpreting the message of Jesus. Its ultimate declared purpose is to help the human beings to become more humane human beings, understood as persons in relation to God.

In this context we find the message that the social doctrine of the Roman Catholic Church sends to the economic world. This message is to all the people who act in an economic context. The appeal regards the moral consequences of their actions. All economic actors should be aware of the consequences of their way of consumption. This call regards also the institutional level and the business level of the economic world. Social doctrine also calls for the construction of institutional frameworks that guarantee transparency in business and dignity at work. Entrepreneurs, for their part, should commit their business not exclusively or absolutely to profit making. The social doctrine of the Roman Catholic Church claims that this way of approaching business, production and consumption, can benefit the enterprise also.

Here probably lays a major objective of the Roman Catholic social thought, to address what economic science could not: we are not made to take advantage from each other, but we are made to love each other in a fraternal world that needs to go beyond egoistic attitudes. The final contribution of the Roman Catholic social doctrine would exactly point to this, namely to make of humanity in the world a global family. Both secular and religious thought can contribute to this.

Some considerations on Benedict XVI's resignation and pope Francis election

On February, 28 2013, Benedict XVI left the papacy. The Archbishop of Buenos Aires, Jorge Mario Bergoglio, was elected as his successor. He took the name pope Francis.

We are now sure that *Caritas in veritate* will remain the only social encyclical of Benedict XVI. Benedict XVI did the historical step through a declaration on February 11, during the Consistory for three canonizations.⁵⁵⁵

The resignation of a pope is something that the Code of Canon Law presents as possible saying that 'if it happens that the Roman Pontiff resigns his office, it is required for validity that the resignation is made freely and properly manifested but not that it is accepted by anyone'.⁵⁵⁶ The whole world, believers and non-believers, was certainly more than surprised to hear that. This is true even if we notice that in 2010 Benedict XVI already pointed out that when a pope is fully aware of being not

⁵⁵⁴ See VI, 3.

⁵⁵⁵ See BENEDICT XVI, *Declaration*. Città del Vaticano, 2013. Full text available online at: http://www.vatican.va/holy_father/benedict_xvi/speeches/2013/february/documents/hf_ben-xvi_spe_20130211_declaratio_en.html

⁵⁵⁶ *Code of Canon Law*, can. 332, 2. Full text available online at: http://www.vatican.va/archive/ENG1104/_P16.HTM

physically and psychologically able to continue the papacy, the pope has the right and, in some cases, the duty to resign from the papacy.⁵⁵⁷

The declaration through which the highest seat of the Vatican was left empty, although brief, contains some relevant elements for reflecting upon Benedict XVI's choice. Indeed, the brief document has been compared to a sort of 'last encyclical' from Benedict XVI.⁵⁵⁸ In particular three elements could help for a serious reflection.⁵⁵⁹

First, Benedict XVI appeals to the fact that he has 'repeatedly examined'⁵⁶⁰ his conscience. Explicating this fact, in the context of such an important choice for the life of the Roman Catholic Church, can be considered as an attempt to put personal conscience at the centre of the religious life. It means to re-affirm the primacy of conscience and of the intimate relationship with God through the prayer, even if in opposition with the tradition. Reading this in the perspective of social doctrine means to notice again how Benedict XVI sees fundamental the confrontation with our conscience. We have said that his social thought emphasizes the role of the choices and behaviour of the individual, and if we assume that his considerations in the declaration have a wider perspective, this confirms that the social thought of Benedict XVI is strongly inspired by a theological reflection on the role of the individual believer in front of God.

Second, in the declaration there is the acknowledgement that 'today's world' is 'subject to many rapid changes'.⁵⁶¹ With his choice Benedict XVI also wants to change something. Because he adheres to the mission of the Roman Catholic Church, Benedict XVI felt the need to resign. The RCC needs a shift, radical changes and renovations; it needs to be ready to face new and old difficulties. In this sense, Benedict XVI as head of the RCC has made what he thinks and believes is the best choice for the RCC. It is not that he is too weak in an absolute sense, but that he is too weak 'to adequately fulfil the ministry entrusted'⁵⁶² to him, so that the resignation appears a coherent act of service for the good of the RCC.⁵⁶³ We could paraphrase this by saying that Benedict XVI made a step backwards to allow the Roman Catholic Church to make a step forward. These considerations become more realistic when we consider that the future of the RCC appears to be outside Europe, or non-West-centred.⁵⁶⁴ Though at first the feelings of the many people hearing him were ranging from surprise to disappointment,⁵⁶⁵ we can now say

⁵⁵⁷ See EDITORIALE, 'Una decisione di grande importanza per la vita della Chiesa', in *La Civiltà Cattolica*, I. 3904. 2013. 323. The article quotes the Italian edition of Benedict XVI's interview with Peter Seewald, BENEDICT XVI, P. SEEWALD, *Light of the world: the pope, the church and the signs of the times*. San Francisco: Ignatius Press, 2010.

⁵⁵⁸ S. FEMMINIS, L'ultima enciclica, in *Popoli. Mensile Internazionale dei Gesuiti*, 3. 2013. 1.

⁵⁵⁹ For the following schematization see FEMMINIS, L'ultima enciclica, in *Popoli*, 1.

⁵⁶⁰ BENEDICT XVI, *Declaration*.

⁵⁶¹ BENEDICT XVI, *Declaration*.

⁵⁶² BENEDICT XVI, *Declaration*.

⁵⁶³ See T. SÖDING, Un papato paolino, in *Il Regno*, 4. 2013. 106; H. LEGRAND, in *Il Regno*, 4. 2013. 107 – 108; EDITORIALE, 'Una decisione di grande importanza per la vita della Chiesa', in *La Civiltà Cattolica*, 323

⁵⁶⁴ See T. P. RAUSCH, Temi di Benedetto XVI per il prossimo futuro, in *La Civiltà Cattolica*, I. 3906. 2013. 571.

⁵⁶⁵ See A. SPADARO, La rinuncia di Benedetto XVI. La stampa, la rete, la gente, in *La Civiltà*

that that choice opens also perspectives of hope and courage for the future of the Roman Catholic Church.⁵⁶⁶

Thirdly, Benedict XVI asks forgiveness for all his sins and all his imperfections. This can be read as a declaration of humanity, namely a declaration of the limitedness and fallibility that every human task bears as it is human. Benedict XVI obviously feels the weight of his age, but to admit one's weaknesses and imperfections also can be read as a sin of mental and spiritual strength.⁵⁶⁷ This is a call to the humble attitude that should aim, but also encourage, every human activity.

Jorge Mario Bergoglio was elected new pope on 13 March 2013, calling himself Francis. Since the first moments of his papacy, he emphasized his role as the bishop of Rome. This has been interpreted as the will of tracing an ecumenical path with other Christian confessions as well as with other religions, and also as an emphasis of the 'local' dimension of the Roman Catholic Church.⁵⁶⁸ If confirmed, and transferred on the level of social doctrine, such an approach can give new strength to the social teaching of the RCC in respect to some difficulties prospected above in this chapter regarding *Caritas in veritate* and the contemporary world.

Three particular novel aspects about pope Francis may be considered. He is the first Jesuit pope, the first from an extra European country in more than a thousand years, and the first to call himself Francis, after Francis of Assisi. All these three elements might furnish us some insights about the possibilities for the directions that the social teaching of the Roman Catholic Church may take in the future.

He is a Jesuit. The Jesuit order, called Society of Jesus, was founded by Ignatius of Loyola in 1534. The Society has a special vow regarding the missionary service that a pope might assign them. To have a Jesuit pope prospects an emphasis on the universality of the Roman Catholic Church's missionary vocation⁵⁶⁹ that should not renounce to deal with the local peculiarities.

He is from Argentina, where in 2001 a huge economic and social crisis almost made the country collapse. This knowledge of what an economic crisis can do is probably a guarantee that he will try to bet on relations of communion and trust, more than on exclusively economic solutions to overcome the actual economic and social crisis of the West. Having been archbishop of Buenos Aires, in South America, he cannot have avoided any contact with the liberation theology. Here, he might be close to the perspective of his predecessors. Namely, a formal or official rejection of liberation theology⁵⁷⁰ as a bishop does not exclude the possibility to endorse some of its practical considerations as a pope. Indeed, that he has always been concerned about the poor people, and that his pastoral activity was oriented

Cattolica, I. 3905. 2013. 426 – 427.

⁵⁶⁶ See EDITORIALE, 'Una decisione di grande importanza per la vita della Chiesa', in *La Civiltà Cattolica*, 323 – 324.

⁵⁶⁷ See SPADARO, La rinuncia di Benedetto XVI, in *La Civiltà Cattolica*, 427 – 429.

⁵⁶⁸ See A. SPADARO, I primi atti di papa Francesco. Una lettura teologica, in *La Civiltà Cattolica*, II. 3907. 2013. 78.

⁵⁶⁹ See EDITORIALE, L'elezione di papa Francesco, in *La Civiltà Cattolica*, I. 3906. 2013. 533.

⁵⁷⁰ See, for instance: <http://www.guardian.co.uk/world/2013/mar/13/jorge-mario-bergoglio-pope-poverty>

towards the common people and not for the elite⁵⁷¹ encourages us to think that he will not forget to make one central theme of his papacy the action necessary to counter the world's misery.

As a Jesuit, the Franciscan vocation and mission is definitely not unknown to Francis. Indeed, Francis of Assisi, together with Saint Dominic, was a major inspiration for the definitive conversion of Ignatius of Loyola.⁵⁷² Also, pope Francis declared that the choice of calling himself Francis is due to the fact that 'he [Francis of Assisi] is the man of poverty, the man of peace, the man who loves and protects creation'.⁵⁷³ In this respect, the view outlined by pope Francis seems social in its deep constitution. Questions will regard the fact whether, and with which weight, the accent will be on the structural or the individual level of injustice, or even on both. Also, a claim for the respect and protection of creation might call for a more incisive consideration by the Roman Catholic Church of the ecological issues, in which collaboration with secular expertise is unavoidable.

For answering these questions we will have probably to wait some more time. Nevertheless, if these three words, poverty, peace, and creation, would really become the three keywords, three objectives, three milestones of this papacy, there will be a papacy that will return to major themes of the social doctrine of the Roman Catholic Church.

⁵⁷¹ See EDITORIALE, L'elezione di papa Francesco, in *La Civiltà Cattolica*, I. 537

⁵⁷² See EDITORIALE, L'elezione di papa Francesco, in *La Civiltà Cattolica*, I. 533. Quoted in the article is the Autobiography see EDITORIALE, L'elezione di papa Francesco, in *La Civiltà Cattolica*, I. 533.

⁵⁷³ FRANCIS, *Audience to representatives of the communications media*. Città del Vaticano, 16 March, 2013. Available online at: http://www.vatican.va/holy_father/francesco/speeches/2013/march/documents/papa-francesco_20130316_rappresentanti-media_en.html

A chronology of key documents on Roman Catholic social teaching

Here is a list of the most significant official documents composing the social teaching of the Catholic Church. With each document a link to a website where the authorized English translation is available, which is also the translation used for the quotations in the text.

<u>1891</u>	Encyclical letter <i>Rerum novarum</i>	LEO XIII	http://www.vatican.va/holy_father/leo_xiii/encyclicals/documents/hf_l-xiii_enc_15051891_rerum-novarum_en.html3
<u>1931</u>	Encyclical letter <i>Quadragesimo anno</i>	PIUS XI	http://www.vatican.va/holy_father/pius_xi/encyclicals/documents/hf_p-xi_enc_19310515_quadragesimo-anno_en.html
<u>1961</u>	Encyclical letter <i>Mater et magistra</i>	JOHN XXIII	http://www.vatican.va/holy_father/john_xxiii/encyclicals/documents/hf_j-xxiii_enc_15051961_mater_en.html
<u>1963</u>	Encyclical letter <i>Pacem in terris</i>	JOHN XXIII	http://www.vatican.va/holy_father/john_xxiii/encyclicals/documents/hf_j-xxiii_enc_11041963_pacem_en.html
<u>1967</u>	Encyclical letter <i>Populorum progressio</i>	PAUL VI	http://www.vatican.va/holy_father/paul_vi/encyclicals/documents/hf_p-vi_enc_26031967_populorum_en.html
<u>1971</u>	Apostolic letter <i>Octogesima adveniens</i>	PAUL VI	http://www.vatican.va/holy_father/paul_vi/apost_letters/documents/hf_p-vi_apl_19710514_octogesima-adveniens_en.html
<u>1981</u>	Encyclical letter <i>Laborem exercens</i>	JOHN PAUL II	http://www.vatican.va/holy_father/john_paul_ii/encyclicals/documents/hf_jp-ii_enc_14091981_laborem-exercens_en.html
<u>1987</u>	Encyclical letter <i>Sollicitudo rei socialis</i>	JOHN PAUL II	http://www.vatican.va/holy_father/john_paul_ii/encyclicals/documents/hf_jp-ii_enc_30121987_sollicitudo-rei-socialis_en.html
<u>1991</u>	Encyclical letter <i>Centesimus annus</i>	JOHN PAUL II	http://www.vatican.va/holy_father/john_paul_ii/encyclicals/documents/hf_jp-ii_enc_01051991_centesimus-annus_en.html
<u>2004</u>	<i>Compendium of the social doctrine of the Church</i>	PONTIFICAL COUNCIL JUSTITIA ET PAX	http://www.vatican.va/roman_curia/pontifical_councils/justpeace/documents/rc_pc_justpeace_doc_20060526_compendio-dott-soc_en.html
<u>2009</u>	Encyclical letter <i>Caritas in veritate</i>	BENEDICT XVI	http://www.vatican.va/holy_father/benedict_xvi/encyclicals/documents/hf_ben-xvi_enc_20090629_caritas-in-veritate_en.html
<u>2011</u>	<i>Towards reforming the financial and monetary systems in the context of global public authority</i>	PONTIFICAL COUNCIL JUSTITIA ET PAX	http://www.vatican.va/roman_curia/pontifical_councils/justpeace/documents/rc_pc_justpeace_doc_20111024_nota_en.html

Documents and texts quoted, as available on the internet

All official Roman Catholic Church's documents, including the *Compendium of the social doctrine of the Church*, all the encyclicals, speeches and all the documentation related to the social doctrine, including documents from the popes and the councils and all Vatican II's documents, can be reached through the Vatican Holy See website:

<http://www.vatican.va/>

All documents published in *Acta Apostolicae Sedis* are available here:

http://www.vatican.va/archive/aas/index_sp.htm

Website of the Pontifical Council for Justice and Peace:

<http://www.justpax.it/pcgp/index.html>

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Samenvatting

De sociaal-economische boodschap van de encycliek *Caritas in Veritate* van Benedictus XVI in het licht van de Rooms-Katholieke sociale leer

Het voornaamste onderwerp van deze studie is een analyse van de encycliek *Caritas in veritate* (2009) van Benedictus XVI. Deze encycliek is een integraal onderdeel van de leer van de Rooms-katholieke Kerk over het economische leven.

Er is binnen de Rooms-katholieke Kerk altijd sprake geweest van een ‘sociale leer’, in de zin van onderricht over sommige aspecten van de economische organisatie. De ontwikkeling van een specifieke sociale leer als een zelfstandige discipline naast het pastorale en theologische onderricht is echter een ontwikkeling in de moderne tijd, die begon met de publikatie van de eerste encycliek die alleen sociale en economische onderwerpen behandelde: *Rerum novarum* van Leo XIII in 1891.

Deze eerste overwegingen brengen ons bij de vragen waarop dit onderzoek poogt een antwoord te geven: Is er sprake van continuïteit en coherentie van de inhoud van *Caritas in veritate* en de eerdere documenten van de sociale leer? Is er sprake van nieuwe inzichten en discontinuïteit ten opzichte van het verleden? In welke mate vertegenwoordigt *Caritas in veritate* een antwoord van Benedictus XVI op de hedendaagse economische crisis? Is er in deze encycliek sprake van een dialoog met heersende economische opvattingen?

Om de inhoud van de encycliek juist te kunnen analyseren is het in ieder geval noodzakelijk om een analyse te geven van de sociale leer van de Rooms-katholieke Kerk in het algemeen aangaande sociaaleconomische onderwerpen. De sociale leer van deze kerk is een leerstellig geheel van onderricht en uitgangspunten aangaande de inrichting van het sociaaleconomische leven. Een dergelijk onderricht heeft geen ‘dogmatisch’ maar wel een ‘leerstellig’ karakter. Dit is van belang voor onze analyse omdat de inhoud van de sociale ‘leer’ onderhevig is aan meer of minder ingrijpende wijzigingen al naargelang de verschillende historische situaties. Het leerstellige karakter van de sociale leer van deze kerk brengt immers ook haar ‘tijdgebondenheid’ aan het licht, dat wil zeggen haar antwoord op historische gebeurtenissen die telkens weer het sociaaleconomische evenwicht binnen de menselijke verhoudingen wijzigen. Omdat het gaat om een leer, en niet om dogmatische stellingname, kan de sociale leer van de Kerk in beginsel ook geheel of gedeeltelijk begrepen en zelfs gewaardeerd worden door hen die zich niet herkennen in het geloof dat wordt beleden door de Rooms-katholieke Kerk. De Rooms-katholieke Kerk richt zich met haar sociale leer sinds Johannes XXIII in de sociale encycliek *Pacem in terris* (1963) tot alle mensen van goede wil.

Sommige uitgangspunten van de sociale leer van de Kerk betreffen meer direct de samenleving en de economie. Deze uitgangspunten vindt men méér of

minder expliciet ook in *Caritas in veritate*. Deze uitgangspunten betreffen in het algemeen de waardigheid van de mens als ‘persoon’; dit personalistisch principe kan worden beschouwd als één van de meest wezenlijke van de sociale leer. Het ‘gemeenschappelijk welzijn’ gaat uit van de mogelijkheid van materieel en geestelijk welzijn voor alle mensen. Het gemeenschappelijk welzijn impliceert een analyse van twee andere verwante uitgangspunten: de ‘universele bestemming van goederen’ en het ‘private eigendom’. Hoewel de sociale leer van de Rooms-katholieke Kerk het private eigendom beschouwt als een natuurlijk recht van elke mens, ziet ze toch de universele bestemming van de goederen als een belangrijker uitgangspunt dan het private eigendom. Met andere woorden, het private eigendom wordt beschouwd als een middel om een juiste verdeling van de rijkdommen na te streven. Twee andere uitgangspunten zijn de beginselen van subsidiariteit en solidariteit. Het subsidiariteitsbeginsel is bedoeld als een tegengif tegen de verleiding voor publieke instituties om in te grijpen bij de oplossing van sociale problemen. Dergelijk ingrijpen zou altijd in evenwicht moeten zijn met de mogelijkheid voor de private persoon om autonoom te handelen bij het oplossen van problemen, waarbij de publieke instituties zouden kunnen bijdragen ter ondersteuning, *subsidium*, van het handelen van de private persoon. Het solidariteitsbeginsel roept degenen die op economisch gebied een rol spelen tot een objectieve verantwoordelijkheid, zowel op *micro-* als op *macro-niveau*, voor de economisch zwakkeren. Het beginsel van solidariteit neemt binnen de sociale leer van de Rooms-katholieke Kerk juist nu een centrale plaats in vanwege de algehele globalisering en sterke sociale spanningen, waarbij de solidariteit wordt beschouwd als een instrument dat ertoe kan bijdragen om de economische globalisering te laten samengaan met de sociale integratie.

Naast deze specifieke beginselen wordt de aandacht gevestigd op de wereld van de arbeid op wereldniveau. De sociale leer van de Kerk ziet kapitaal en werk als noodzakelijk in het huidige productiesysteem. Tegelijkertijd kent zij aan arbeid een groter gewicht toe dan aan kapitaal. Dat betekent dat de rechten van de arbeiders belangrijker zijn dan de winst. Op wereldniveau betekent dit, dat deze overwegingen ertoe moeten leiden om opnieuw na te denken over de opzet van de economie waarbij dikwijls een deel van de winst juist wordt gerealiseerd dankzij geringe aandacht van de economisch belanghebbenden en de politici voor de rechten van de arbeiders.

Nadat enkele terminologische en historische aspecten zijn verhelderd, en de betekenis van enkele beginselen van de sociale leer van de Kerk zijn geanalyseerd, wordt in het tweede deel van deze studie geprobeerd nader toegang te krijgen tot de betekenis van de encycliek *Caritas in veritate* van Benedictus XVI.

Caritas in veritate werd in 2009 gepubliceerd, tijdens een wereldwijde economische crisis. In feite zijn enkele analyses en suggesties ervan te beschouwen als het antwoord van de Rooms-katholieke Kerk op de economische crisis. Benedictus XVI treedt met zijn sociale encycliek in het voetspoor van eerdere pauselijke en conciliaire documenten over het economische leven, met name voor

wat betreft de onderwerpen die de waardigheid van de menselijke persoon en de ontwikkeling betreffen. Met name de encycliek *Populorum progressio* (1967) van Paulus VI en de uitspraken van het Tweede Vaticaans Concilie (1962 – 1965) zijn klaarblijkelijk de voornaamste bronnen die de algehele atmosfeer van *Caritas in veritate* bepalen.

Aan *Populorum progressio* ontleent Benedictus XVI het thema van de ‘ontwikkeling als roeping’ en de ‘integrale ontwikkeling van de mens’. Het eerste onderwerp betreft de natuurlijke neiging van de menselijke persoon naar vooruitgang, hetgeen dus een menselijke eigenschap is. Het tweede onderwerp betreft het geheel van de ontwikkeling, die niet beschouwd mag worden als louter materieel en economisch. Wil ontwikkeling authentiek zijn, in de betekenis die Paulus VI eraan toekent en die wordt hernomen door Benedictus XVI, dan houdt die ontwikkeling rekening met de gehele menselijke persoon, dus ook met betrekking tot het geestelijke aspect en de waardigheid van de persoon gezien als geschapen naar Gods beeld en gelijkenis.

De invloed van Vaticanum II blijkt uit de algehele atmosfeer van dialoog waarin Benedictus XVI zich uitdrukt. Aan de ene kant is er de oproep aan de economische rede om zich open te stellen voor andere disciplines zoals de theologie en de ethiek. Een ‘verbreding van ons begrip van de rede’ is dat wat Benedictus XVI ziet als een mogelijke weg om het pad te verlaten van kil economisch rationalisme dat teveel in zichzelf is opgesloten, en dat teveel lijkt te zijn gericht op de ontwikkeling van middelen die kunnen leiden tot meer winst binnen de economie zonder rekening te houden met de betrokkenen, namelijk de personen. Benedictus XVI erkent ook, nog steeds in lijn met Vaticanum II, de bijdrage die kan komen van alle godsdiensten van de wereld aan een vreedzame ontwikkeling volgens de geestelijke en culturele waarden waarvan deze de natuurlijke dragers zijn.

De huidige economische crisis wijst niet alleen op de sociale en economische ongelijkheid in de wereld, maar wordt door *Caritas in veritate* tevens gezien als een ‘kans om te komen tot nieuw inzicht’, en dus om tot een nieuwe ontwikkeling en een nieuwe visie op de toekomst te komen. Het eerste punt dat *Caritas in veritate* maakt, komt overeen met de overwegingen van economen zoals Amartya Sen, die inderdaad niet alleen de economische en sociale ongelijkheid als een reëel gegeven beschouwen dat door de globalisering alleen maar duidelijker naar voren komt, maar ook de mogelijkheid en de noodzaak benadrukken om hier een oplossing voor te zoeken. Een andere overeenkomst die men kan opmerken tussen de encycliek van Benedictus XVI en sommigen in de economische wetenschap is de wens, dat er een wereldwijde en onafhankelijke autoriteit wordt geschapen om de financiële markten te reguleren. De beoogde wereldwijde autoriteit lijkt veel op de institutionele invulling zoals voorgesteld door Joseph Stiglitz, volgens wie het niet coherent is om binnen een enkele wereldwijde markt een veelheid aan regelgeving te hebben met betrekking tot de financiële wereld.

Door de thema's van de gelijkheid en de sociale gerechtigheid te behandelen, begeeft *Caritas in veritate* zich op een gebied waar niet alleen voorgaande documenten van de sociale leer hun bijdrage hebben geleverd, maar ook de bevrijdingstheologie. In feite zijn deze onderwerpen, weergegeven in het begrip 'keuze voor de armen', de centrale thema's van de theologische overwegingen van de bevrijdingstheologie. Desalniettemin blijven er verschillen, complicaties en misverstanden die nog verhelderd dienen te worden. Hoewel in *Caritas in veritate* Benedictus XVI zich niet lijkt te willen openstellen voor de bevrijdingstheologie als een geprivilegieerde methodologie, kunnen we toch tekenen van dialoog opmerken. Allereerst is er een dialoog op algemeen niveau tussen de bevrijdingstheologie en de Rooms-katholieke Kerk. Sinds de jaren '60 toen de bevrijdingstheologen van Zuid-Amerika hun boodschap van de keuze voor de armen begonnen te propageren, heeft de Katholieke Kerk toch, ondanks de afwijzing van een deel van de kerkelijke hiërarchie, de typische terminologie van de bevrijdingstheologie zich eigen gemaakt, waarvan de 'keuze voor de armen' een duidelijk voorbeeld is. Anderzijds is op te merken hoe Joseph Ratzinger in de tijd waarin hij Prefect was van de Congregatie voor de Geloofsleer zich fel verzette tegen *enkele aspecten* van de bevrijdingstheologen. Sinds hij eenmaal gekozen was als Benedictus XVI kunnen wij echter duidelijk zien hoe er zich een betekenisvolle dialoog met de bevrijdingstheologie heeft ingezet met de benoeming tot Prefect van de Congregatie voor de Geloofsleer van Gerhard Ludwig Müller, een Duits priester die altijd dicht bij de bevrijdingstheologie heeft gestaan.

In *Caritas in veritate* is vervolgens een voorstel te vinden voor een 'economie van gemeenschap'. Hier stemt Benedictus XVI in met een voorstel dat is ontstaan binnen de geestelijke beweging van de Focolare, gesticht door Chiara Lubich in 1943 in Italië. Binnen deze geestelijke beweging van de Katholieke Kerk ontwikkelt zich, op aandringen van haar stichteres en van de kant van haar leden, een nieuwe idee om economie te bedrijven. De markt wordt gebruikt als een 'middel' en niet als een 'doel', en men probeert de markt te gebruiken in al zijn socialiserende kracht. De ondernemingen herinvesteren de winst voornamelijk in drie delen. Een eerste is bestemd voor de armen en voor hun meest onmiddellijke noden. Een tweede deel is gewijd aan opvoeding en vorming. Een derde deel wordt opnieuw geïnvesteerd in het bedrijf. Zo ontstaat de 'economie van gemeenschap' die *Caritas in veritate* opvoert als een nieuw economisch model voor de toekomst dat weigert om zich te laten inkaderen in marktmechanismen zoals de optimalisatie van de winst zelfs ten koste van de menselijke waardigheid.

Voor wat betreft punten die als zwak gekwalificeerd kunnen worden in *Caritas in veritate* is het wellicht goed te benadrukken hoe in de encycliek er meer aandacht besteed had kunnen worden aan ecologie. Ecologie wordt niet geheel verzwegen. Toch zou men hebben kunnen verwachten, dat het klimaat en zijn belang op het terrein van de economie en de ontwikkeling met meer aandacht en nauwgezetter zou zijn behandeld, vooral wat betreft de ontwikkeling van alternatieve

energie bronnen en de bijdrage die elke katholieke gelovige hieraan zou kunnen geven in het dagelijks leven.

In een poging om tenminste ten dele antwoord te geven op de eerder gestelde vragen, kunnen we besluiten met te zeggen dat enkele voorstellen van de encycliek *Caritas in veritate* hun wortels hebben in de theologie van Benedictus XVI en in de voorgaande onderrichtingen van de Rooms-katholieke Kerk, maar tevens ook in elk opzicht redelijk zijn te noemen wanneer men ze vergelijkt met voorgestelde maatregelen en overwegingen op gebieden die verschillen van de kerkelijke en theologische wereld, zoals die van de economie.

Een andere overweging ter conclusie betreft het feit dat, hoewel *Caritas in veritate* duidelijke verbanden laat zien met de sociale leer van de pausen vóór Benedictus XVI, er interessante nieuwe ontwikkelingen zijn op te merken. Onder deze is waarschijnlijk de aandacht die Benedictus XVI vraagt voor het fenomeen van de globalisering. Enerzijds confronteert de globalisering ons met de trieste werkelijkheid van een wereld die is verdeeld in extreem rijke mensen en extreem arme mensen. Het is een situatie van extreme ongelijkheid tussen een wereld die leeft in overvloed en een die leeft in ontbering waarvoor op het eerste gezicht geen oplossing schijnt te zijn. Anderzijds ziet Benedictus XVI echter juist in de globalisering de mogelijkheid voor de opbouw van een enkele wereld waarin de broederschap van alle mensen, van elke godsdienst, van gelovigen en ongelovigen, de bindende factor is van de volkeren, en waar ook het respect voor de rechten van de menselijke persoon wereldwijd wordt erkend.

Curriculum Vitae

Roberto Puggioni was born on May 28 1979 in Cagliari, Italy. In 2006 he earned his Laurea triennale (bachelor) in 'Amministrazione, Governo e Sviluppo Locale' at the Facoltà di Scienze Politiche of the Università degli Studi di Cagliari, in Cagliari, Sardinia, Italy. In 2008 he earned his Laurea specialistica (Master degree) in 'Scienze dell Amministrazione Pubblica' at the same university. From February until June 2008, in the last year of his master, he was an Erasmus student at the Vrije Universiteit Brussel, in Brussels, Belgium, where he did research work for his master thesis and attended several courses in the field of political sciences and philosophy of politics. Since November 2009 he worked as a PhD candidate at the Leiden University Institute of Religious Studies, at Leiden University, the Netherlands. This was made possible with a grant from the Regione Autonoma della Sardegna that financed his stay in the Netherlands through the program 'Master & Back'.