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# POPE JOHN PAUL II AND THE “PREFERENTIAL OPTION FOR THE POOR”

REVEREND GERALD S. TWOMEY, PH.D.†

By the end of his pontificate in April of 2005, Pope John Paul II completed one hundred and four major overseas journeys to countries on every inhabited continent, and inched forward toward becoming the second longest serving Pope in history. His exposure to varied cultures offered him an unparalleled view as the chief shepherd of the Roman Catholic Church. During his flight to Brazil en route to a pastoral visit in 1980, he told a member of the press entourage: “‘My job is to teach, but I teach learning and I learn teaching.’”<sup>1</sup> Avery Cardinal Dulles, S.J., suggests that “John Paul was a social ethicist, anxious to involve the Church in shaping a world order of peace, justice, and fraternal love.”<sup>2</sup> John Paul’s travels greatly expanded both his worldview and church-view, and oriented them toward the enactment of a culture of life.<sup>3</sup> He reflected this goal in an interview in *La Stampa* with journalist Jas Gawronski on November 2, 1993: “At the end of the second millennium, we must make an examination of conscience: where we are, where Christ has brought us, where we have deviated from the

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<sup>1</sup> DAVID WILLEY, *GOD’S POLITICIAN: POPE JOHN PAUL II, THE CATHOLIC CHURCH, AND THE NEW WORLD ORDER* 120 (1992). See generally AVERY DULLES, *THE SPLENDOR OF FAITH: THE THEOLOGICAL VISION OF POPE JOHN PAUL II* (rev. & updated ed. 2003) (giving a comprehensive theological assessment of John Paul II’s mature pontificate).

<sup>2</sup> Avery Cardinal Dulles, *From Ratzinger to Benedict*, 160 *FIRST THINGS* 24, 29 (2006).

<sup>3</sup> See LUIGI ACCATTOLI, *WHEN A POPE ASKS FORGIVENESS: THE MEA CULPAS OF JOHN PAUL II*, at xxiii–xxiv (Jordan Aumann trans., 1998). In the same text, Accatoli states: “[I]f the Pope had not traveled, the mea culpas would not have been so numerous.” *Id.* at 45.

Gospel.”<sup>4</sup> Pope John Paul II’s stance in relation to the “preferential option for the poor” requires precisely the same type of probity and analysis: “Where was he?,” “Where did Christ (and the Spirit of the Risen Lord) bring him?,” and “Where has the Church deviated from the Gospel (and how has it reverted to its message)?”

At times, various partisans ascribed to John Paul the desire to turn back the clock on Catholic social teaching in an attempt to restore a more “traditionalist” approach to doctrine and practice. Such claims proved groundless, failing to take into account the complexity of the Pontiff as a critical thinker and the many facets of the agenda that he embraced and sought to advance. John Paul II learned much “on the job.” He further developed a post-Vatican II concept of justice that extended beyond the more static natural law approach of *suum quique tradere* (“give each person his or her due”) and “act according to right reason,” and embraced a more biblically-based ethic, rooted in both Testaments.<sup>5</sup> Indeed, as John Paul exhorted the assembled bishops of Latin America during the Third General Conference of the Latin American Episcopal Council (“CELAM III”) at Puebla, Mexico, in January of 1979:

In the spirit of the Church, which is the spirit of Christ, and supported by its ample, solid teaching, let us get back to work in this field. . . . [D]rink at these authentic fonts, Brothers. Speak in the idiom of Vatican II, John XXIII, and Paul VI. For that is the idiom that embodies the experience, the suffering, and the hope of contemporary humanity.<sup>6</sup>

As Irish social ethicist Donal Dorr asserted:

As regards the content of his social teaching there is no “backtracking” from the position of Paul VI or John XXIII. Indeed, he has taken much stronger stands against injustice and in defense of human rights than were ever taken by his predecessors. On the two key issues of liberation and the

<sup>4</sup> *Id.* at 53 (quoting Jas Gawronski, LA STAMPA, Nov. 2, 1993).

<sup>5</sup> See Philip Land, *Justice*, in THE NEW DICTIONARY OF THEOLOGY 548, 548–49 (Joseph A. Komonchak, Mary Collins & Dermot A. Lane eds., 1987); see also John R. Donahue, *What Does the Lord Require?: A Bibliographical Essay on the Bible and Social Justice*, 25 STUD. SPIRITUALITY JESUITS 20–21 (1993).

<sup>6</sup> John Paul II, Opening Address at the Puebla Conference (Jan. 28, 1979), in PUEBLA AND BEYOND: DOCUMENTATION AND COMMENTARY 57, 67 (John Eagleson & Philip Scharper eds., John Drury trans., 1979) [hereinafter Puebla Opening Address].

"option for the poor," his teaching has moved forward further than Paul VI rather than backward to an older line.<sup>7</sup>

No less seasoned an observer of the world political scene, former Soviet Premier Mikhail Gorbachev attested to the major role that John Paul played in the restructuring of the new world order: "Everything that happened in Eastern Europe in these last few years would have been impossible without the presence of this Pope and without the important role—including the political role—that he played on the world stage."<sup>8</sup>

On certain levels, John Paul eschewed political involvement by clergy. As he told a group of seventy-four priests whom he ordained in Brazil in 1980: "You are not doctors or social workers, you are not politicians or trade unionists."<sup>9</sup> Earlier that same year, during his first pastoral visit to Africa, John Paul exhorted a group of priests in Zaire to be pastors, not politicians.<sup>10</sup> Yet in contrast—in an interview published in *La Stampa* in 1992—John Paul clarified his own acceptance of

<sup>7</sup> DONAL DORR, *OPTION FOR THE POOR: A HUNDRED YEARS OF VATICAN SOCIAL TEACHING* 361 (rev. ed. 1992). For the most complete, up-to-date treatments of the theme of Pope John Paul II and the "preferential option for the poor," available in English, see generally Donal Dorr, *Poor, Preferential Option For*, in *THE NEW DICTIONARY OF CATHOLIC SOCIAL THOUGHT* 755, 755–59 (Judith A. Dwyer & Elizabeth L. Montgomery eds., 1994); Gustavo Gutiérrez, *Option for the Poor*, in *MYSTERIUM LIBERATIONIS: FUNDAMENTAL CONCEPTS OF LIBERATION THEOLOGY* (Ignacio Ellacuría & Jon Sobrino eds., 1993); Paul Surlis, *Option for the Poor*, in *NEW CATHOLIC ENCYCLOPEDIA: JUBILEE VOLUME—THE WOJTYLA YEARS* 370, 370–71 (Peter M. Gareffa et al. eds., 2001); Gerald S. Twomey, *THE "PREFERENTIAL OPTION FOR THE POOR" IN CATHOLIC SOCIAL THOUGHT FROM JOHN XXIII TO JOHN PAUL II* 225–73 (2005).

Symbolically, like his two immediate predecessors, John Paul eschewed the use of the papal tiara as a symbol of prestige and temporal power. See ACCATTOLI, *supra* note 3, at 25–26 ("[T]he gift of the papal tiara for the poor also had a note of self-examination, and this time as a confrontation with Roman pomp and ceremony.")

<sup>8</sup> WILLEY, *supra* note 1, at xii (internal quotation marks omitted).

<sup>9</sup> PAUL JOHNSON, *POPE JOHN PAUL II AND THE CATHOLIC RESTORATION* 102 (1981) (quoting John Paul II, Homily to Newly Ordained Priests in Brazil (July 2, 1980) (transcript in Portuguese available at [http://www.vatican.va/holy\\_father/john\\_paul\\_ii/homilies/1980/documents/hf\\_jp-ii\\_hom\\_19800702\\_priests-brazil\\_po.html](http://www.vatican.va/holy_father/john_paul_ii/homilies/1980/documents/hf_jp-ii_hom_19800702_priests-brazil_po.html)) (internal quotation marks omitted). Several years later, he echoed these sentiments almost verbatim in an address to Salvadoran priests. See John Paul II, Meeting with Priests in San Salvador (Mar. 6, 1983) (transcript in Spanish available at [http://www.vatican.va/holy\\_father/john\\_paul\\_ii/speeches/1983/march/documents/hf\\_jp-ii\\_spe\\_19830306\\_marcelino-champagnat\\_sp.html](http://www.vatican.va/holy_father/john_paul_ii/speeches/1983/march/documents/hf_jp-ii_spe_19830306_marcelino-champagnat_sp.html)).

<sup>10</sup> John Paul II, Address to Priests in Kinshasa (May 4, 1980), in *Address to Priests: Be Mediators, Not Politicians*, 10 *ORIGINS* 10, 11 (NC News Service trans., 1980).

Gorbachev's claim that he exerted major political influence on Eastern Europe:

I do not believe that one can talk about a political role in the strict sense, because the Pope has his mission to preach the Gospel. But in the Gospel there is the human person, respect for the human person, and, therefore, human rights, freedom of conscience and everything that pertains to humans. If this has political significance, then, yes, it applies also to the Pope.<sup>11</sup>

For John Paul II, the Church's political role intimately connected to its call to preach the Gospel. In a 1983 talk to the Latin American Bishops' Conference, he announced that the theme for CELAM IV slated for Santo Domingo—in observance of the Columbus quincentennial in 1992—would be the “New Evangelization.” He defined the task of the Dominican Republic gathering as “a commitment, not to re-evangelization, but to a new evangelization, new in ardor, methods[,] and expression.”<sup>12</sup> The theme of the “New Evangelization” served as a constant determinant of John Paul's social doctrine, since he believed that authentic human development must be grounded in an ever-deepening proclamation of the message of salvation in Jesus Christ.<sup>13</sup> Speaking at the Vatican during the 1984 *ad limina* visit of the Colombian bishops—and citing the Puebla “Final Document”—John Paul asserted: “The greatest service that we can render to others is evangelization, which prepares them to fulfill themselves as children of God, liberates them from injustice, and leads them to fuller life.”<sup>14</sup> John Paul viewed evangelization as directed to all humanity, not just exclusively to any single group, including the materially poor: “Evangelization must uplift humanity, *giving them above all faith, salvation in*

<sup>11</sup> DORR, *supra* note 7, at 361.

<sup>12</sup> John Paul II, Speech to the CELAM Assembly in Port-au-Prince (Mar. 9, 1983), in *Pope John Paul II to CELAM: The Task of the Latin American Bishop*, 12 ORIGINS 659, 661 (NC News Service trans., 1983). See generally Avery Dulles, *John Paul II and the New Evangelization*, 166 AMERICA 52, 52–59, 69–72 (1992) (giving an excellent overview of this theme from a North American perspective).

<sup>13</sup> See JOHN PAUL II, ENCYCLICAL LETTER *CENTESIMUS ANNUS* ¶ 54 (1991) [hereinafter *CENTESIMUS ANNUS*] (explaining that man reveals himself in Christ's salvation through evangelization); JOHN PAUL II, ENCYCLICAL LETTER *REDEMPTORIS MISSIO* ¶ 58 (1990) [hereinafter *REDEMPTORIS MISSIO*] (positing that evangelization aids human development); JOHN PAUL II, ENCYCLICAL LETTER *SOLLICITUDO REI SOCIALIS* ¶ 41 (1987) [hereinafter *SOLLICITUDO REI SOCIALIS*] (stating that the Church employs her social doctrine toward an end goal of evangelization).

<sup>14</sup> Insegnamenti II (1984), at 999.

*Christ*, the means and instruction to obtain these. For truly poor are those who lack material necessities, but even poorer are those who are ignorant of the path that God points out to them."<sup>15</sup>

On January 28, 1979, in his "Opening Address" for the CELAM III conference at Puebla, John Paul emphasized the linkage in evangelization between the truth about Jesus Christ, the Church's mission, and human beings.<sup>16</sup> He added: "[T]he Church has learned that an indispensable part of its evangelizing mission is made up of works on behalf of justice and human promotion."<sup>17</sup> He connected these three strands more explicitly in 1992 at the CELAM IV conference at Santo Domingo, calling upon the assembled bishops to direct their focus toward "the three doctrinal and pastoral elements that constitute the three axes of the new evangelization: . . . a deep and solid Christology, a sound anthropology[,] and a clear and correct ecclesiological vision."<sup>18</sup> John Paul's theology did not represent a retreat or retrenchment from the advances of the Second Vatican Council, which the Pope often reiterated was "the fundamental event in the life of the contemporary Church [and served for him personally as] the constant reference point of every pastoral action."<sup>19</sup> Instead, his evolving pastoral vision continued to follow the sweep of the trajectory initiated by John XXIII and Vatican II, and carried on by Paul VI and the great social documents issued during the pontificates of his papal namesakes. John Paul II placed this emphasis in context in the "Opening Address" at the Puebla conference in 1979: "This is very much in line with the view of Vatican II: i.e., that to achieve a life worthy of a human being, one cannot limit oneself to *having more*, one

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<sup>15</sup> John Paul II, Homily in Santo Domingo (Oct. 12, 1984) (transcript in Spanish available at [http://www.vatican.va/holy\\_father/john\\_paul\\_ii/homilies/1984/documents/hf\\_jp-ii\\_hom\\_19841012\\_celebrazione-santo-domingo\\_sp.html](http://www.vatican.va/holy_father/john_paul_ii/homilies/1984/documents/hf_jp-ii_hom_19841012_celebrazione-santo-domingo_sp.html)).

<sup>16</sup> See Puebla Opening Address, *supra* note 6, at 59–64.

<sup>17</sup> *Id.* at 66.

<sup>18</sup> John Paul II, Opening Address of the Holy Father at the Santo Domingo Conference (Oct. 12, 1992), in *SANTO DOMINGO AND BEYOND: DOCUMENTS AND COMMENTARIES FROM THE FOURTH GENERAL CONFERENCE OF LATIN AMERICAN BISHOPS* 41, 44 (Alfred T. Hennelly ed., 1993) [hereinafter *Santo Domingo Opening Address*].

<sup>19</sup> See AVERY DULLES, *VATICAN II AND THE EXTRAORDINARY SYNOD: AN OVERVIEW* 5 (1986) (internal quotation marks omitted) (giving background and commentary on this key quotation).

must strive to *be more...*"<sup>20</sup> In this same vein, the 1992 CELAM IV "Conclusions" emphasized: "New evangelization demands that the Church undergo a pastoral conversion. Such a conversion must be in keeping with the [themes of the Second Vatican] [C]ouncil."<sup>21</sup>

John Paul regularly insisted that the Church's social mission include the truth about human beings, and reflect a clear and correct anthropology. The human individual had long been a centerpiece of Catholic social thought,<sup>22</sup> but John Paul's legacy sharpened and refined Catholic social teaching on the dignity of the person. In his "Opening Address" at Puebla, John Paul stressed that the Church "opt[s] solely for the human being,"<sup>23</sup> and that "the Church's concern is for the whole human being."<sup>24</sup> He added that such an anthropology can never be separated from a "deep and solid Christology" which reveals the fullness of the truth about Jesus Christ. As he addressed the poor of Barrio Santa Cecilia in Guadalajara, Mexico, on January 30, 1979:

The Pope loves you because you are the beloved of God. When he established his family, the Church, he had present before him the poor and needy human race, and to redeem that race he sent his very own son, who was born a poor man and lived among the poor in order to enrich us through his poverty. . . . [T]he figure of Christ, hanging on the Cross as the price for the redemption of the human race, is a penetrating call to spend our lives in the service of the needy, in accordance with the movement of a love that . . . sides not with injustice but with the truth.<sup>25</sup>

According to one of his biographers, George Williams: "In the perspective of generations of Christian scholarship it will come to be noted that the evolving papal stress on the dignity of man received its most notable and swift expansion in the pre-papal

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<sup>20</sup> Puebla Opening Address, *supra* note 6, at 67 (internal citation omitted).

<sup>21</sup> FOURTH GENERAL CONFERENCE OF LATIN AMERICAN BISHOPS: CONCLUSIONS, in SANTO DOMINGO AND BEYOND, *supra* note 18, at 83 [hereinafter CONCLUSIONS].

<sup>22</sup> See J. Bryan Hehir, *John Paul II: Continuity and Change in the Social Teaching of the Church*, in CO-CREATION AND CAPITALISM: JOHN PAUL II'S LABOREM EXERCENS 124, 130 (John W. Houck & Oliver F. Williams eds., 1983).

<sup>23</sup> Puebla Opening Address, *supra* note 6, at 66.

<sup>24</sup> *Id.* at 67.

<sup>25</sup> DORR, *supra* note 7, at 76–77 (quoting John Paul II, Speech to the Poor of Santa Cecilia at Guadalajara (Jan. 30, 1979) (transcript available in Spanish at [http://www.vatican.va/holy\\_father/john\\_paul\\_ii/speeches/1979/january/documents/hf\\_jp-ii\\_spe\\_19790130\\_messico-guadalajara-barrio-pobre\\_sp.html](http://www.vatican.va/holy_father/john_paul_ii/speeches/1979/january/documents/hf_jp-ii_spe_19790130_messico-guadalajara-barrio-pobre_sp.html))).

and papal pronouncements of Pope John Paul II."<sup>26</sup> John Paul's emphasis toward human dignity appeared early in his pontificate, in his first encyclical, *Redemptor Hominis*:

Man in the full truth of his existence, of his personal being and also of his community and social being . . . is the primary route that the Church must travel in fulfilling her mission: he is the primary and fundamental way for the Church, the way traced out by Christ himself, the way that leads invariably through the mystery of the Incarnation and the Redemption.<sup>27</sup>

He echoed the underpinnings of *Redemptor Hominis* in an address delivered during his 1980 papal visit to Brazil:

It is the mission of the Church to travel the human path because the human person—without any exception whatsoever—has been redeemed by Christ, and because with the human—with each human being, without any exception whatsoever—Christ is in a way united even when that person is unaware of it.<sup>28</sup>

J. Bryan Hehir suggested that "[t]he principal way in which John Paul II addresse[d] the social questions [was] through human rights categories."<sup>29</sup> John Paul not only applied human rights categories from the social teaching of his immediate predecessors, but he also developed his own distinctive interpretation and application of human rights theory by supporting both political-civil and social-cultural-economic rights. He noted in a 1981 allocution: "The Church would not be faithful to the Gospel if she were not close to the poor and if she did not defend their rights."<sup>30</sup> John Paul proposed that unjust

<sup>26</sup> GEORGE HUNTSTON WILLIAMS, *THE MIND OF JOHN PAUL II: ORIGINS OF HIS THOUGHT AND ACTION* 264 (1981).

<sup>27</sup> JOHN PAUL II, ENCYCLICAL LETTER *REDEMPTOR HOMINIS* ¶ 14 (1979) [hereinafter *REDEMPTOR HOMINIS*].

<sup>28</sup> John Paul II, *The Eucharist is Love and Charity from Which Brotherly Sharing Springs* (July 9, 1980), in JOHN PAUL II, *BRAZIL: JOURNEY IN THE LIGHT OF THE EUCHARIST* 329 (1980).

<sup>29</sup> Hehir, *supra* note 22, at 137. For a fuller treatment of this issue, see generally DAVID HOLLENBACH, *CLAIMS IN CONFLICT: RETRIEVING AND RENEWING THE CATHOLIC HUMAN RIGHTS TRADITION* (1979). John Paul II's most important statements on "human rights"—following in the tradition begun in *Catholic Social Teaching* by Pope John XXIII in his 1961 encyclical, *Mater et Magistra*—often appeared in speeches or allocutions addressed to the United Nations. See *PATHS TO PEACE: A CONTRIBUTION—DOCUMENTS OF THE HOLY SEE TO THE INTERNATIONAL COMMUNITY* 628–30 (1987) (indexing John Paul's quotes addressing human rights).

<sup>30</sup> John Paul II, *Papal Address to Cardinals: The Church in the World of the '80s* (Dec. 22, 1980), in 10 *ORIGINS* 490 (1981).

distribution of wealth and engrained, structural injustice require the Church's spirited advocacy for—and in defense of—the rights of the poor.<sup>31</sup>

The Puebla *Final Document* repeated a phrase from John Paul's opening address at the conference: "[T]here arises a grave structural conflict: 'The growing affluence of a few people parallels the growing poverty of the masses.'" <sup>32</sup> In the preceding paragraph of this same address, John Paul stated more succinctly: "[T]his poverty is not a passing phase. Instead it is the product of economic, social, and political situations and structures . . . [that] create a situation on the international level where the rich get richer at the expense of the poor, who get even poorer."<sup>33</sup> In the homily delivered at Yankee Stadium during his first visit to the United States on October 2, 1979, the Pope further elaborated upon this theme: "[Y]ou will also want to seek out the structural reasons which foster or cause the different forms of poverty in the world and in your own country, so that you can apply the proper remedies."<sup>34</sup> John Paul stressed this point in an address outside of Manila, during his February of 1981 pastoral visit to the Philippines: "You [people of affluent means] must give a lot. And you must think about how to give—how to organize socio-economic life . . . in such a way that will tend to bring about equality between people, rather than putting a yawning gap between them."<sup>35</sup> In this same vein, he concluded:

Do all that you can, especially you who have decision-making powers, you upon whom the situation of the world depends, do everything to make the life of every person in your country more human, more worthy of the human person. Do all you can to ensure the disappearance, albeit gradually, of that yawning gap that divides the few "excessively rich" from the great masses of the poor, the people who are subjugated in grinding poverty.<sup>36</sup>

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<sup>31</sup> See John Paul II, Homily at Yankee Stadium (Oct. 2, 1979), in *PILGRIMAGE OF PEACE: THE COLLECTED SPEECHES OF JOHN PAUL II IN IRELAND AND THE UNITED STATES* 87, 88 (1980) [hereinafter Homily at Yankee Stadium].

<sup>32</sup> Final Document of the Third General Conference of the Latin American Episcopate § 1209, in *PUEBLA AND BEYOND*, *supra* note 6, at 273 [hereinafter Final Document] (partially quoting Puebla Opening Address, *supra* note 6, at 67).

<sup>33</sup> Puebla Opening Address, *supra* note 6.

<sup>34</sup> Homily at Yankee Stadium, *supra* note 31, at 88.

<sup>35</sup> John Paul II, Address to the Poor of Tondo (Feb. 18, 1981), in *73 ACTA APOSTOLICAE SEDIS* 718, 855–56 (1981).

<sup>36</sup> *Id.* at 856.

Although John Paul unquestionably preoccupied himself with the "East-West" conflict—as evidenced by Mikhail Gorbachev's observation regarding the key role played by the Pope in the collapse of the "Iron Curtain"—over time his concern shifted more dramatically toward the so-called "North-South" conflict stemming from Third World debt and underdevelopment; John Paul recognized that such problems were driving nations south of the Tropic of Cancer into deeper financial distress and economic misery. The Pope reflected these concerns in the text of his 1981 social encyclical *Laborem Exercens*, which commemorated the eightieth anniversary of Pope Leo XIII's landmark *Rerum Novarum*, in which the Slavic Pope discussed the emerging global tensions not only between East and West, but also between North and South.

From his 1979 address before the United Nations General Assembly<sup>37</sup> to the array of social encyclicals that marked his mature pontificate,<sup>38</sup> John Paul urged the development of a new order for world political and economic structures.<sup>39</sup> His highly-developed anthropology offered criteria by which to judge both economic and social systems against the backdrop of such concerns. In a September of 1984 public address delivered at Edmonton in Alberta, Canada, the Pope reflected upon the global situation in terms of the exploitation of poor southern nations by their wealthier neighbors to the north:

[T]he South—becoming always poorer. And the North—becoming always richer. . . . [T]his poor South will judge the rich North. And the poor people and poor nations—poor in different ways, not only lacking food, but also deprived of freedom and other human rights—will judge those people who take these goods away from them, amassing to themselves the imperialistic monopoly of economic and political supremacy at the expense of others.<sup>40</sup>

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<sup>37</sup> See generally John Paul II, Address at the General Assembly of the United Nations (Oct. 2, 1979), in *PILGRIMAGE OF PEACE*, *supra* note 31, at 68–78.

<sup>38</sup> See generally *CENTESIMUS ANNUS*, *supra* note 13; *REDEMPTORIS MISSIO*, *supra* note 13; JOHN PAUL II, ENCYCLICAL LETTER *LABOREM EXERCENS* (1981) [hereinafter *LABOREM EXERCENS*]; *REDEMPTOR HOMINIS*, *supra* note 27.

<sup>39</sup> See Homily at Yankee Stadium, *supra* note 31, at 88 ("But neither will you recoil before the reforms—even profound ones—of attitudes and structures that may prove necessary in order to re-create over and over again the conditions needed by the disadvantaged if they are to have a fresh chance in the hard struggle of life.")

<sup>40</sup> John Paul II, *Development: The Progress of All the Disadvantaged*, in 14 *ORIGINS* 245, 246–47 (1984).

The North-South conflict received fuller attention in his 1987 social encyclical, *Sollicitudo Rei Socialis*, wherein John Paul II addressed the struggle against material poverty and underdevelopment in the South, and the moral and spiritual poverty caused by "overdevelopment" in the North.<sup>41</sup> In this same document, he noted:

I wish to appeal with simplicity and humility to everyone, to all men and women without exception. I wish to ask them to be convinced of the seriousness of the present moment and of each one's individual responsibility, and to implement—by the way they live as individuals and as families, by the use of their resources, by their civic activity, by contributing to economic and political decisions and by personal commitment to national and international undertakings—the measures inspired by solidarity and love of preference for the poor. This is what is demanded by the present moment and above all by the very dignity of the human person, the indestructible image of God the Creator, which is identical in each one of us.<sup>42</sup>

In his 1991 encyclical, *Redemptoris Missio*, John Paul further expounded upon this theme:

[A] soulless development cannot suffice for human beings, and an excess of affluence is as harmful as excessive poverty. This is a "development model" which the North has constructed and is now spreading to the South, where a sense of religion as well as human values are in danger of being overwhelmed by a wave of consumerism.<sup>43</sup>

Although seasoned Vatican-watchers concede that in the early years of John Paul II's pontificate "the word *liberation* [was] not part of the Pope's ordinary vocabulary,"<sup>44</sup> he later appropriated a nuanced usage of the term. In a general audience on February 21, 1979—shortly after returning from his first trip to Latin America—John Paul reflected:

[L]iberation, then, is certainly a reality of faith, one of the fundamental biblical themes, which are a deep part of Christ's salvific mission. . . . This subject has never ceased to constitute the content of the spiritual life of Christians. The Conference of Latin-American Episcopate bears witness that this subject

<sup>41</sup> *SOLLICITUDO REI SOCIALIS*, *supra* note 13, ¶¶ 14–15.

<sup>42</sup> *Id.* ¶ 47.

<sup>43</sup> *REDEMPTORIS MISSIO*, *supra* note 13, ¶ 59.

<sup>44</sup> THE THEME OF LIBERATION: TEXTS OF JOHN PAUL II, OCTOBER, 1978–NOVEMBER, 1979, at 2 (Roger Heckel ed., 1980).

returns in a new historical context; therefore it must be taken up again in the teaching of the Church, in theology, and in the apostolate.<sup>45</sup>

During the same weekly audience, John Paul concluded:

The "theology of liberation" is often connected (sometimes too exclusively) with Latin America; but it must be admitted that one of the great contemporary theologians, Hans Urs von Balthassar, is right when he demands a theology of liberation on a universal scale. . . . The task of theology is to find its real significance in the different concrete[,] historical, and contemporary contexts.<sup>46</sup>

In 1980—during an address to the bishops of CELAM during his first Brazilian trip—John Paul returned to this theme, in a manner critical of some of the then-fledgling currents of liberation theology:

An important theme at the Puebla conference was liberation. . . . It is indispensable to distinguish, in the variety of treatments and currents of liberation, between what implies "a right Christian concept of liberation . . . in its integral and deep meaning as stated by Jesus," and other forms of liberation that are different and are even at odds with Christian commitment. The criterions offered by the church must be faithfully applied.<sup>47</sup>

In the next paragraph, John Paul cited the Puebla *Final Document*, dismissed the dialectic of class struggle, and pointed to the "risk of ideologization,"<sup>48</sup> while warning of the dire consequences deriving from recourse to Marxist analysis.<sup>49</sup> He brandished a similar admonition during the plane ride to Puebla the previous year, as he told a New York Times reporter: "Liberation theology is a genuine theology. But it can perhaps be a false theology. If theology begins to be politicized, if it starts to apply doctrines of political systems, ways of analysis which are not Christian, then this is no longer theology. Liberation theology, surely, but which one?"<sup>50</sup>

<sup>45</sup> John Paul II, Liberation Theology Involves "That Truth Which Made Us Free" (Feb. 21, 1979), in *L'OSSERVATORE ROMANO*, Feb. 26, 1979, at 1.

<sup>46</sup> *Id.*

<sup>47</sup> John Paul II, Address to the Bishops of CELAM (July 2, 1980), in *ADDRESSES AND HOMILIES GIVEN IN BRAZIL 17* (Nat'l Catholic News Serv. trans., 1980).

<sup>48</sup> *See id.* (internal quotation marks omitted).

<sup>49</sup> *See id.*

<sup>50</sup> George Vecsey, *Pope John Paul Finishes His Latin American Trip; Study of*

Over the course of time, John Paul embraced a broader understanding of the tenets of liberation theology. Following the line of both the Medellín and Puebla final documents—in a letter to the Brazilian bishops in April of 1986—he wrote: “The poor of this nation, the poor of this continent, are the first to feel the urgent need for this gospel of *radical* and *integral liberation*. To deny them would be to defraud and disillusion them.”<sup>51</sup> Elsewhere in this same letter, John Paul concluded:

[T]he theology of liberation is not only timely but useful and necessary. It should constitute a new state—in close connection with former ones—of the theological reflection initiated with the apostolic tradition and continued by the great fathers and doctors, by the ordinary and extraordinary magisterium and, in more recent years, by the rich patrimony of the church’s social doctrine . . . . May God help you to be unceasingly watchful so that a correct and necessary theology of liberation can develop in Brazil and in Latin America in a homogenous and not heterogeneous fashion with relation to the theology of all times, in full fidelity to church doctrine, *attentive to a preferential but not excluding or exclusive love for the poor*.<sup>52</sup>

Following in the tradition of Pope Paul VI’s 1967 encyclical *Populorum Progressio*, John Paul—in *Sollicitudo Rei Socialis*—demonstrated a more centrist approach as he advocated new ways of confronting and combating poverty and underdevelopment in the Third World.<sup>53</sup> He embraced a posture that

makes liberation the fundamental category and the first principle of action. The positive values, as well as the deviations and risks of deviation, which are damaging to the faith and are connected with this form of theological reflection and method, have been appropriately pointed out. . . . This in fact is the purpose of development, or rather liberation and development, taking into account the intimate connection between the two.<sup>54</sup>

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*Morality Urged*, N.Y. TIMES, Feb. 1, 1979, at A2.

<sup>51</sup> Letter from John Paul II to Brazilian Episcopal Conference (Apr. 9, 1986), in LIBERATION THEOLOGY: A DOCUMENTARY HISTORY 498, 504 (Alfred T. Hennelly ed., 1990).

<sup>52</sup> *Id.* at 503–04 (emphasis added).

<sup>53</sup> See *SOLLICITUDO REI SOCIALIS*, *supra* note 13, ¶¶ 5–6, 46–47.

<sup>54</sup> *Id.* ¶ 46. According to Leonardo Boff, “[t]he encyclical *Sollicitudo Rei Socialis*, equat[ed] development with liberation, without realizing that liberation seeks to be an alternative to development . . . .” Leonardo Boff, *The Originality of the Theology of Liberation*, in EXPANDING THE VIEW: GUSTAVO GUTIÉRREZ AND THE FUTURE OF

In his address to the Bishops of Latin America, delivered at the beginning of the CELAM IV conference in Santo Domingo, John Paul devoted an entire section to the theme of "human development."<sup>55</sup> The 1992 Santo Domingo final document, *Conclusions*, reflected a decided tendency to favor the language of "development" over that of "liberation."<sup>56</sup> The "four key words" cited within the final text<sup>57</sup> that sought to encapsulate the Church's "social and spiritual heritage"—i.e., "reconciliation," "solidarity," "integration," and "communion"<sup>58</sup>—conspicuously omit "liberation." In fact, Cardinal Angelo Sodano, the Vatican Secretary of State, gave the impression in a press interview that Santo Domingo made the option for Christ "the only one."<sup>59</sup> Yet as one of the principal themes of the theology of liberation, the "preferential option for the poor" weathered this storm and remained firmly ensconced within the Santo Domingo final document, and within the formal pronouncements of Pope John Paul II at CELAM IV as well.<sup>60</sup>

Regarding the specific appropriation of the term "preferential option for the poor," John Paul II deliberately avoided its use during the early years of his pontificate. He perceived it as a source of potential divisiveness within the Church and society, and as identified too closely with partisan interests and ideologies such as Marxism.<sup>61</sup> As Paul Sigmund indicated, fear of the development of a "parallel church" emanating from within base communities fueled concern within

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LIBERATION THEOLOGY 47, 56 (Marc H. Ellis & Otto Maduro eds., 1990) (citation omitted).

<sup>55</sup> See John Paul II, Inaugural Address on the Occasion of the 4th General Conference of the Latin American Episcopate (Oct. 12, 1992), in *Address to Bishops of Latin America*, L'OSSERVATORE ROMANO, Oct. 21, 1992, at 8.

<sup>56</sup> See, e.g., CONCLUSIONS, *supra* note 21, §§ 292, 302.

<sup>57</sup> John Paul II, *Message of the Fourth General Conference to the Peoples of Latin America and the Caribbean*, in SANTO DOMINGO AND BEYOND, *supra* note 18, at 70.

<sup>58</sup> *Id.*

<sup>59</sup> Stefania Falasca, *Defending the Essential*, 30 DAYS IN THE CHURCH & THE WORLD, Nov. 11, 1992, at 24, 25.

<sup>60</sup> See, e.g., CONCLUSIONS, *supra* note 21, at 153; Santo Domingo Opening Address, *supra* note 18, at 50.

<sup>61</sup> This is a theme that John Paul II forcefully reiterated during his 1980 pastoral visit to Brazil. See John Paul II, Address to CELAM (July 2, 1980), in 72 ACTA APOSTOLICAE SEDIS 858, 865 (1980); John Paul II, Address to the Brazilian Bishops (July 10, 1980), in 72 ACTA APOSTOLICAE SEDIS at 944, 957; John Paul II, Address to the Shanty Dwellers of Vidigal (July 10, 1980), in 72 ACTA APOSTOLICAE SEDIS at 852, 856; John Paul II, Address to the Workers in Morumbi Stadium, São Paulo (July 4, 1980), in 72 ACTA APOSTOLICAE SEDIS at 887, 890–91.

certain Vatican circles that the term had been interpreted as a quasi-class alignment, *vis-à-vis*, pitting the poor against the rich. This led to the standard Vatican practice of substituting the phrases "preferential love" or "love of preference of the poor"<sup>62</sup> in place of "preferential option for the poor" in official documents, deliberately avoiding the latter phrase in writings and allocutions issued during John Paul's early pontificate. In his *Opening Address at Puebla*, John Paul completely abstained from using "preferential option for the poor,"<sup>63</sup> although he found alternative ways to express the same concept, such as by stating that the Church "is prompted by an authentically evangelical commitment which, like that of Christ, is primarily a commitment to those most in need," and "opt[s] solely for the human being."<sup>64</sup> During his first transatlantic trip in 1979, he expressed this concept in similar words in a sermon delivered at Mexico's Basilica of Our Lady of Guadalupe, describing the Medellín conference as a call of hope that showed "[a] preferential but not exclusive love for the poor."<sup>65</sup> In his frequently cited address to the poor of Guadalajara, Mexico, on January 29, 1979, John Paul stated: "I feel solidarity with you because, being poor, you are entitled to my particular concern. I tell you the reason at once: The Pope loves you because you are

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<sup>62</sup> See PAUL E. SIGMUND, *LIBERATION THEOLOGY AT THE CROSSROADS: DEMOCRACY OR REVOLUTION?* 188 (1990) (describing the change in Vatican phraseology).

<sup>63</sup> This omission is all the more striking, in light of Cardinal Aloysius Lorscheider's observation that upon reading the Puebla Final Document, "one notes that the prophetic option, preferential and in solidarity for the poor, appears something like 646 times. Considering that the Puebla document has 1310 numbered paragraphs, it is evident even from the statistics that this option had a central position at Puebla." ROSINO GIBELINI, *THE LIBERATION THEOLOGY DEBATE* 48-49 (1988). Even with its due cautions, the introduction to the initial Congregation for the Doctrine of the Faith instruction on liberation theology—*Instruction on Certain Aspects of the "Theology of Liberation"*—stated: "This warning should in no way be interpreted as a disavowal of all those who want to respond generously and with an authentic evangelical spirit to the 'preferential option for the poor.'" CONGREGATION FOR THE DOCTRINE OF THE FAITH, *INSTRUCTION ON CERTAIN ASPECTS OF THE "THEOLOGY OF LIBERATION"* (1984) [hereinafter *CERTAIN ASPECTS*]. Note that later within the text, this same document asserted: "The different theologies of liberation are situated between the 'preferential option for the poor', forcefully reaffirmed without ambiguity after Medellín at the Conference of 'Puebla' . . ." *Id.* at pt. VI ¶ 5.; see also *LIBERATION THEOLOGY*, *supra* note 51.

<sup>64</sup> Puebla Opening Address, *supra* note 6, at 66.

<sup>65</sup> See John Paul II, Homily at the Basilica of Guadalupe (Jan. 27, 1979), in *PUEBLA AND BEYOND*, *supra* note 6, at 74.

God's favorites."<sup>66</sup> In his remarks to *campesinos* and Indians at Cuilapan later that same day, he struck an even more forceful note—recalling his predecessor, Pope Paul VI—when he stated:

With him I would like to reiterate—with an even stronger emphasis in my voice, if that were possible—that the present pope wishes to be “in solidarity with your cause, which is the cause of the humble people, the poor people.” I wish to reiterate that the pope is with these masses of people who are “almost always left behind in an ignoble standard of living and sometimes treated harshly and exploited.”

I adopt the view of my predecessors, John XXIII and Paul VI, and of Vatican II. Seeing a situation that remains alarming, that is seldom better and sometimes even worse, the pope chooses to be your voice. . . . [He is] the conscience of consciences, an invitation to action, to make up for lost time, which has frequently been a time of prolonged sufferings and unsatisfied hopes.<sup>67</sup>

Later in the same address, John Paul continued in the line of thought upon which Paul VI embarked in *Populorum Progressio*, noting that, for the sake of oppressed workers,

we must act promptly and thoroughly. We must implement bold and thoroughly innovative transformations. Without further delay, we must undertake the urgently required reforms.

It should not be forgotten that the measures taken have to be suitable. The Church defends the legitimate right to private property in itself; but it is no less clear in teaching that there is always a social mortgage on all private property, so that goods may serve the general assignment that God has given them. And if the common good demands it, there is no need to hesitate at expropriation itself, done in the right way.<sup>68</sup>

While John Paul II eschewed the use of the phrase “preferential option for the poor” at Puebla, his public addresses delivered there greatly influenced the conference’s outcome toward this issue. This fact is evidenced by the frequency with which his words were woven into the text of the final document.

<sup>66</sup> John Paul II, Address in the Santa Cecilia District (Jan. 29, 1979), in 71 ACTA APOSTOLICAE SEDIS 220, 220 (1979). He paraphrased this remark in his address at Monterey. John Paul II, Address at Monterey (Jan. 31, 1979), in 71 ACTA APOSTOLICAE SEDIS at 240.

<sup>67</sup> John Paul II, Address to the Indians of Oaxaca and Chiapas (Jan. 29, 1979), in PUEBLA AND BEYOND, *supra* note 6, at 82 (citations omitted).

<sup>68</sup> *Id.* (citations omitted).

One can hardly dispute Donal Dorr's assessment of John Paul's role at Puebla: "Quotations from his addresses were used as the basis for reaching consensus on divisive issues, notably the questions of liberation, 'option for the poor,' and the Church's attitude towards ideologies."<sup>69</sup> The Puebla *Final Document* was written proof that the Pope succeeded in achieving the main purpose of his visit—to contribute to the unity of the Latin American bishops—and helped them to find a direction in which to move forward collectively. In the aftermath of Puebla—because the phrase "preferential option for the poor" apparently sounded a partisan note according to John Paul and his curial advisors—it was predominantly shunned from the lexicon of official Catholic social teaching. The term never appeared in the Vatican Congregation for Catholic Education's comprehensive 1988 *Guidelines for the Study and Teaching of the Church's Social Doctrine in the Formation of Priests*,<sup>70</sup> nor in the original or revised versions of the *Catechism of the Catholic Church*.<sup>71</sup> It also remained conspicuously absent from his major social encyclical, *Sollicitudo Rei Socialis*, in which John Paul continued to demonstrate his predilection for the alternative term, "love of preference for the poor."<sup>72</sup>

While Pope Paul VI earned the sobriquet "the Pilgrim Pope" with seven international trips, his was dwarfed by the rigorous travel schedule of John Paul II. Donal Dorr asserts:

Of the various "pastoral visits" made by John Paul II to different parts of the world, by far the most significant, from the point of view of an "option for the poor," was his first trip to Brazil. It lasted twelve days—from 30 June to 11 July 1980. . . . [T]he overall impression the Pope gave was that of

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<sup>69</sup> DORR, *supra* note 7. The Puebla Final Document strongly condemned three ideologies: liberal capitalism, Marxist collectivism, and the so-called doctrine of "national security." See Final Document, *supra* note 6, at 199–201.

<sup>70</sup> See CONGREGATION FOR CATHOLIC EDUCATION, GUIDELINES FOR THE STUDY AND TEACHING OF THE CHURCH'S SOCIAL DOCTRINE IN THE FORMATION OF PRIESTS (1988).

<sup>71</sup> In paragraph 544, the *Catechism of the Catholic Church* states that "Jesus identifies himself with the poor of every kind and makes active love toward them the condition for entering his kingdom." CATECHISM OF THE CATHOLIC CHURCH ¶ 544 (2d ed. 2003). In a commentary on this text, then-Cardinal Joseph Ratzinger wrote: "In this passage, the *Catechism* points to the deepest root of what today we call the 'preferential option for the poor.'" JOSEPH RATZINGER, GOSPEL, CATECHESIS, CATECHISM: SIDELIGHTS ON THE CATECHISM OF THE CATHOLIC CHURCH 42 (1997).

<sup>72</sup> See *SOLLICITUDO REI SOCIALIS*, *supra* note 13, ¶¶ 42, 47.

being broadly in solidarity with the main body of Brazilian Bishops in their commitment to putting the Church on the side of the poor and oppressed.<sup>73</sup>

Among John Paul's major addresses were the talks delivered to one hundred and fifty assembled Latin American prelates representing CELAM at Rio de Janeiro, as well as his speech to the episcopate of Brazil at Fortaleza. In the former, John Paul noted: "I rightly called for an option and preference for the poor, one that should be neither exclusive nor excluding."<sup>74</sup> In his address to the Brazilian bishops on July 10, 1980, John Paul further elucidated his evolving understanding of the concept behind a "preferential option for the poor":

You know that the preferential option for the poor, forcefully proclaimed at Puebla, is not an invitation to exclusivism. . . . But it is a call to special solidarity with the humble and the weak, with those who are suffering and weeping, who are humiliated and left on the fringes of life and society, in order to have them realize more fully their own dignity as human persons and children of God.<sup>75</sup>

The Pope expounded further upon this point during his visit to the Vidigal *favela* of Rio de Janeiro on that same day:

The Church of the poor speaks first and foremost of every person. . . . It is not the Church of a class or social caste. . . . The Church of the poor has not wished to serve political ends or power struggles. Indeed, it strives most assiduously to keep its words and actions from being utilized for a like end—from being manipulated.<sup>76</sup>

During this visit, he symbolically removed his gold fisherman's ring, permitting its sale to benefit the poor.<sup>77</sup> As John Paul stressed in his address to Brazilian workers at Morumbi

<sup>73</sup> DORR, *supra* note 7, at 276–77. Interestingly, the addresses delivered during John Paul's *second* pastoral visit to Brazil in 1991 displayed considerably more reserve on issues of social justice. Cf. John Paul II, Address to Representatives of Indigenous Communities (Oct. 16, 1991), in *The Pope in Brazil: Address to Native Peoples*, L'OSSERVATORE ROMANO, Oct. 7, 1991, at 10; John Paul II, Address to the Inhabitants of the "Favela do Lixão de S. Pedro" in Vitória (Oct. 19, 1991), in *The Pope in Brazil: Speech to Residents of Shanty-Town*, L'OSSERVATORE ROMANO, Nov. 4, 1991, at 4.

<sup>74</sup> Address to the Bishops of CELAM, *supra* note 47, at 15 (citation omitted).

<sup>75</sup> Address to the Bishops of Brazil, *supra* note 61, at 956–57.

<sup>76</sup> Address to the Shanty Dwellers at Vidigal, *supra* note 61, at 856 (1980). John Paul returned to this point in his 1981 social encyclical that commemorated the 90th anniversary of *Rerum Novarum*. See *LABOREM EXERCENS*, *supra* note 38, ¶ 8.

<sup>77</sup> See WILLEY, *supra* note 1, at 220 (discussing this event in detail).

Stadium, "[t]he option for the poor is a Christian option; it is also the option of a society that is concerned with the true common good."<sup>78</sup>

John Paul began to show an increased tendency to utilize the term "preferential option for the poor" following his first visit to Brazil—albeit in a qualified way—by adding the phrase "but not exclusive."<sup>79</sup> During his trip to the Philippines in 1981, he stated that the defense of the poor's dignity is not a luxury: "[T]he preference for the poor is a Christian preference! It is a preference that expresses the concern of Christ, who came to proclaim a message of salvation to the poor, for the poor are indeed loved by God, and God it is who guarantees their rights."<sup>80</sup> John Paul elaborated upon the well-known expression of Pope John XXIII—i.e., that the Church is, and desires to be, the "Church of the poor"<sup>81</sup>—in his 1981 social encyclical, *Laborem Exercens*, as well as in the addresses given during his 1980 visit to Brazil. John Paul's extensive travels and contacts within developing nations gradually transformed his perspective toward the option for the poor, as revealed in his later social teachings.<sup>82</sup> A Peruvian observer, Alberto Maguina Lorco,<sup>83</sup> suggested that the dominant tone of *Laborem Exercens* was specifically tailored to Latin America. He argued that a papal address announcing the encyclical—and slated for delivery two days before the original publication date—plainly stressed its Latin American roots.<sup>84</sup> The address was interspersed with quotations from the

<sup>78</sup> Address to the Workers of Brazil at Morumbi Stadium, São Paulo, *supra* note 61, at 891.

<sup>79</sup> JOHN PAUL II, POST-SYNODAL APOSTOLIC EXHORTATION: *ECCLESIA IN AMERICA* ¶ 67 (1999).

<sup>80</sup> John Paul II, To Plantation Owners and Workers: Justice and the Land (Mar. 12, 1981), in 10 *ORIGINS* 617, 618 (1981).

<sup>81</sup> PETER HEBBLETHWAITE, POPE JOHN XXIII: SHEPHERD OF THE MODERN WORLD 425–26 (1985); VATICAN COUNCIL, *ACTA SYNODALIA SACROSANCTI CONCILII OECUMENICI VATICANI II*, vol. I, pt. IV, at 330 (1971).

<sup>82</sup> See generally Ernest Bartell, *Laborem Exercens: A Third World Perspective, in CO-CREATION AND CAPITALISM: JOHN PAUL II'S LABOREM EXERCENS* 174, 174–98 (John W. Houck & Oliver F. Williams eds., 1983) (discussing John Paul II's visits to Latin America and his dedication to the working poor).

<sup>83</sup> Alberto Maguina Larco, *Encíclica Laborem Exercens: Radicál Novedad, ¿QUÉ HACER?*, Nov. 1981, at 66–99.

<sup>84</sup> The address was postponed on account of the near-fatal assassination attempt on John Paul's life on the Feast of Our Lady of Fatima, May 13, 1981. The text of the address was subsequently published in *L'Osservatore Romano*, but was never formally delivered. See *Pope Recovering From Assassination Attempt*, *L'OSSERVATORE ROMANO*, May 18, 1981, at 1–2 (discussing the assassination attempt and publishing the intended

Puebla conference, as well as with public pronouncements from his visit to Brazil in 1980. The chief exponent of liberation theology—Peruvian theologian Gustavo Gutiérrez—noted in his favorable commentary on this encyclical:

The first social encyclicals were situated above all in a European context. *Populorum Progressio* then clearly intended to take a different tack. [*Laborem Exercens*] reinforces this latter point of view. Therefore, it should not seem strange that *Laborem Exercens* has been less well received in Europe than in the Third World.<sup>85</sup>

In his *Apostolic Exhortation on the Family (Familiaris Consortio)*, dated November 22, 1981, John Paul II hinted at the term "preferential option for the poor" for the first time in an official papal document. He stated that "[t]he Christian family is thus called upon to offer everyone a witness of generous and disinterested dedication to social matters through a 'preferential option' for the poor and disadvantaged."<sup>86</sup> Despite this initial precedent, Pope John Paul continued to display a pronounced reticence and discomfort with unqualified use of the term. He later clarified his philosophy while speaking at the opening of the CELAM meeting in Port-au-Prince, Haiti, on March 9, 1983; John Paul lamented "the bitterness of those who, because of an erroneous option for the poor, feel that they are abandoned and forgotten in their aspirations and religious needs."<sup>87</sup> Later in that same address to the CELAM delegates, the Pope again warned against the divisiveness of class struggle within the Church:

The very poorest must find a preference in your fatherly hearts and your pastoral solicitude. Therefore you know and proclaim that a like option would be neither pastoral nor Christian were it to be inspired in mere political or ideological criteria, were it to be exclusive or excluding, or if it were to foment feelings of hatred, or a struggle among sisters or brothers.<sup>88</sup>

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speech).

<sup>85</sup> GUSTAVO GUTIÉRREZ, *SOBRE EL TRABAJO HUMANO: COMMENTARIOS A LA ENCÍCLICA "LABOREM EXERCENS"* 19 (1982).

<sup>86</sup> John Paul II, *The Apostolic Exhortation on the Family*, in 11 *ORIGINS* 437, 453 (1981).

<sup>87</sup> John Paul II, *Opening Address at CELAM Meeting, Port-au-Prince (Mar. 9, 1983)*, in 75 *ACTA APOSTOLICAE SEDIS* 765, 773 (1983).

<sup>88</sup> *Id.* at 775.

At this juncture in his pontificate, John Paul displayed great concern for what he perceived as deviations and distortions in Catholic social teaching emanating from Latin America. He confronted this issue in the third section of the address: "it is necessary to spread and . . . to recover the wholeness of the message of Puebla, without deformed interpretations or deformed reductions, and without unwarranted applications of some parts and the eclipse of others."<sup>89</sup>

John Paul's pastoral visit to Central America during March of 1983 was marred with controversy, deriving primarily from his confrontations with Sandinistas during both his reception on the airport tarmac and his celebration of outdoor Mass at an athletic stadium in Managua, Nicaragua. He warned against the possibility of "instrumentalization of the Gospel," and its subjugation to ideologies such as Marxism.<sup>90</sup> Some leftist and progressive elements in the Latin American press complained that John Paul "conspicuously made no reference to the 'preferential option for the poor,' preached by the Latin American Church since Medellín and confirmed as a principle for the whole Church by the Pope himself in the encyclical *Laborem Exercens*."<sup>91</sup> On February 2, 1984—when then-President of CELAM and Archbishop of Medellín, Alfonso Lopez Trujillo, was named a Cardinal—supporters of the developing liberation theology were further distraught to learn of the Pope's high praise for the Colombian prelate, in which the Pontiff opined: "His contribution to the study and clarification of theology, particularly of the so-called theology of liberation, has been and remains an eminent service to the Church."<sup>92</sup>

Evidence of a deepening chasm between John Paul and the progressive elements of the Latin American Church surfaced with the publication of the Congregation for the Doctrine of the Faith's ("CDF's") *Instruction on Certain Aspects of the Theology of Liberation*, on September 3, 1984.<sup>93</sup> This instruction was preceded by the same Vatican congregation's promulgation of *Ten*

<sup>89</sup> *Id.*

<sup>90</sup> John Paul II, Address in Managua, Nicaragua (Mar. 4, 1983), in 75 ACTA APOSTOLICAE SEDIS at 720–22.

<sup>91</sup> LIBERATION THEOLOGY, *supra* note 51, at 339–40 (citing *Central Americans Respond to Papal Visit*, LATINAMERICA PRESS, May 24, 1983).

<sup>92</sup> 181 CELAM BULLETIN 1 (Mar.–Apr. 1983).

<sup>93</sup> The English translation of this text is contained in LIBERATION THEOLOGY, *supra* note 51, at 393–414.

*Observations on the Theology of Gustavo Gutiérrez* in March of 1983,<sup>94</sup> along with Cardinal Joseph Ratzinger's essay critiquing liberation theology published a year later.<sup>95</sup> Following the issuance of the 1984 CDF instruction, Leonardo Boff received a "letter of admonition" from Cardinal Ratzinger<sup>96</sup> as Prefect of the Congregation for the Doctrine of the Faith, and was summoned to Rome in order to respond to criticisms of his book, *Church: Charism and Power*.<sup>97</sup> The 1984 Vatican instruction on liberation theology acknowledged the existence of many different varieties of liberation theology, but claimed to address only those proposing what it described as

a novel interpretation of both the content of faith and of Christian existence . . . [based on] [c]oncepts uncritically borrowed from Marxist ideology and recourse to theses of a biblical hermeneutic marked by rationalism[,] . . . [that led to a] new interpretation which is corrupting whatever was authentic in the generous initial commitment on behalf of the poor.<sup>98</sup>

The "Introduction" to the 1984 CDF instruction on liberation theology warned against tools of Marxist analysis used "in an insufficiently critical manner," but concluded that "[t]his warning should in no way be interpreted as a disavowal of all those who want to respond generously and with an authentic evangelical spirit to the 'preferential option for the poor.'"<sup>99</sup> It conceded that

<sup>94</sup> *Id.* at 348–50.

<sup>95</sup> *Id.* at 367–74.

<sup>96</sup> For the text of Ratzinger's letter, see MISIÓN ABIERTA, Feb. 1985, at 9–13.

<sup>97</sup> LEONARDO BOFF, CHURCH: CHARISM AND POWER—LIBERATION THEOLOGY AND THE INSTITUTIONAL CHURCH (John W. Diercksmeier trans., 1985). On this occasion, Boff acceded to a year of silencing, with the accompanying comment: "Of one thing I am sure: I prefer to walk with the Church than to go it alone with my theology. The Church is a reality of Faith that I assume. Theology is a product of reason that I discuss." *Respuesta de Leonardo Boff a la Carta del Cardenal Joseph Ratzinger*, 1 REVISTA LATINOAMERICANA DE TEOLOGIA 340–41 (1984); see Leonardo Boff, *Defense of His Book, Church: Charism and Power*, in LIBERATION THEOLOGY, *supra* note 51, at 431–34; Congregation of the Doctrine of the Faith, *Notification Sent to Father Leonardo Boff Regarding Errors in His Book, Church: Charism and Power*, in LIBERATION THEOLOGY, *supra* note 51, at 425–30.

<sup>98</sup> CERTAIN ASPECTS, *supra* note 63, ¶¶ 9–10. In his critique of the instruction, Juan Luis Segundo argued: "Even if Marxism did not exist—and today many of the most famous theologians in Latin America have nothing more than a polite relationship with Marxism—liberation theology would be condemned as a humanistic, earthly, and secular reduction of the Gospel of salvation." JUAN LUIS SEGUNDO, THEOLOGY AND THE CHURCH: A RESPONSE TO CARDINAL RATZINGER AND A WARNING TO THE WHOLE CHURCH 91 (John W. Diercksmeier trans., 1987).

<sup>99</sup> CERTAIN ASPECTS, *supra* note 63.

“[t]he powerful and almost irresistible aspiration that people have for ‘liberation’ constitutes one of the principal ‘signs of the times’ which the Church has to examine and interpret in the light of the Gospel.”<sup>100</sup> Further, the text of the instruction cautioned:

The different theologies of liberation are situated between the ‘preferential option for the poor’, forcefully reaffirmed without ambiguity after Medellín at the Conference of ‘Puebla’ on the one hand, and the temptation to reduce the Gospel to an earthly gospel on the other. We should recall that the preferential option described at ‘Puebla’ is two-fold: for the poor and ‘for the young’. It is significant that the option for the young has in general been passed over in total silence.<sup>101</sup>

Finally, it warned against the adoption of the theory of class struggle as an undergirding principle of liberation theology, which it charged deviated from acceptable norms:

[S]ome go so far as to identify God Himself with history and to define faith as “fidelity to history”, which means adhering to a political policy which is suited to the growth of humanity, conceived as a purely temporal messianism.

As a consequence, faith, hope, and charity are given a new content: they become “fidelity to history”, “confidence in the future”, and “option for the poor”. This is tantamount to saying they have been emptied of their theological reality.<sup>102</sup>

Yet surprisingly, even after the promulgation of the instruction—at a press conference announcing its publication—Cardinal Joseph Ratzinger acknowledged that Marxism “contain[ed] certain valid, useful elements, but a much greater degree of vigilance, and a much more conscious criticism, [were] in order,”<sup>103</sup> thus requiring continuing oversight of the literary output of liberation theology exponents.

Properly speaking, the first Vatican instruction on liberation theology was not a blanket condemnation, but rather a stern warning about its possible consequences. The tenor of the documents, and the methodology employed in their preparation, subjected the CDF to some sharp criticism. One of the most sustained, systematic critiques came from a principal

<sup>100</sup> *Id.* ¶ 1.

<sup>101</sup> *Id.* ¶ 5.

<sup>102</sup> *Id.* ¶¶ 4–5.

<sup>103</sup> L' OSSERVATORE ROMANO, Dec. 3–4, 1984, at 4.

practitioner of the theology of liberation, the Paraguayan Jesuit Juan Luis Segundo:

In my view, and after the most careful analysis of which I am capable, the document emanating from . . . [the CDF] has not yet presented proof that liberation theology, in its basic and universally known features, is a "grave deviation from Christian faith," still less that it is "a negation in practice" of that faith.<sup>104</sup>

Cardinal Paulo Evaristo Arns of Brazil complained directly to Cardinal Ratzinger as Prefect of the Congregation for the Doctrine of the Faith that no input had been solicited directly from exponents of the theology of liberation; moreover, those bishops with the most extensive and intimate pastoral contact with the oppressed were never consulted in the framing of the document, in what the Cardinal perceived as an affront to the spirit of dialogue and collegiality.<sup>105</sup> The instruction and its preparatory documents were broadly regarded as an attack on liberation theology and its key proponents, especially by a circle of conservative theologians and prelates in the Vatican, Germany, and parts of Latin America.<sup>106</sup>

In anticipation of such criticism, the editorial board of the prestigious international review of theology, *Concilium*, launched a pre-emptive show of support for liberation theology, which appeared in print under the title *Statement of Solidarity with Liberation Theologians*.<sup>107</sup> After publication of the 1984 C.D.F. instruction, the highly respected Archbishop of Milan—Jesuit scripture scholar Cardinal Carlo Maria Martini—called for a special restraint in the criticism of this evolving expression of theology. In a statement broadcast over Vatican Radio, he stressed that "the theology of liberation means encouragement

<sup>104</sup> SEGUNDO, *supra* note 98, at 95.

<sup>105</sup> See HARVEY COX, THE SILENCING OF LEONARDO BOFF: THE VATICAN AND THE FUTURE OF WORLD CHRISTIANITY 100–01, 124–25 (1988) (writing that the Boff case "escalated the quarrel between Rome and the Third World to a new and ominous level"); SEGUNDO, *supra* note 98, at 69; Leonardo Boff, *Vatican Instruction Reflects European Mindset*, in LIBERATION THEOLOGY, *supra* note 51, at 415–18; Gustavo Gutiérrez, *Criticism Will Deepen, Clarify Liberation Theology*, in LIBERATION THEOLOGY, *supra* note 51, at 419–24; Ronaldo Muñoz, *Reacciones de los Teólogos Latinamericanos a Propósito de la "Instrucción,"* 1 REVISTA LATINOAMERICANA DE TEOLOGIA 239 (1984).

<sup>106</sup> See COX, *supra* note 105, at 56–57 (discussing Leonardo Boff's criticism of the instruction); SEGUNDO, *supra* note 98, at 9–14 (describing how Latin American theologians generally did not support the instruction).

<sup>107</sup> Editorial Bd. of *Concilium*, *Statement of Solidarity with Liberation Theologians*, in LIBERATION THEOLOGY, *supra* note 51, at 390–492.

for the oppressed," and pleaded that its exponents ought not be "discouraged, but enlightened and encouraged, especially those who, in Latin America, bring to it genuine expression, often with a deep spirit of sacrifice."<sup>108</sup> The Primate of Belgium, Cardinal Godfried Danneels, expressed similar concerns about the downstream negative effects of the instruction:

It is painful to see theologians blacklisted and their credibility harmed. The grassroots pastoral ministry suffers. Bishops ought to be encouraging those who work in this ministry. There is something tragic in all this, after so much effort, with such encouraging initial results. . . . Suffering can be salutary, but we should not aggravate it. . . . We ought to be showing our support for the poor and for their theologians.<sup>109</sup>

Just prior to his death in 1984, the renowned German Jesuit theologian Karl Rahner wrote to then-Cardinal Archbishop of Lima, Juan Landázuri Ricketts, with an offer of assurance: "Liberation theology . . . is thoroughly orthodox, and is aware of its limits within the whole context of Catholic theology. Moreover, it is deeply convinced (correctly, in my opinion) that the voice of the poor must be listened to in the context of the Latin American Church."<sup>110</sup> In the face of unrelenting scrutiny, liberation theologians managed to marshal support for their ideas.

The initial criticism and subsequent dialogue precipitated by the first Vatican instruction on liberation theology bore fruit on a variety of levels. Pope John Paul II himself asked that the first instruction be modified to include five new introductory sections.<sup>111</sup> He appeared to distance himself personally from the 1984 instruction, as evidenced by his comment to the press: "It is Cardinal Ratzinger's."<sup>112</sup> One of the more balanced assessments of the first instruction's impact came in a Peruvian newspaper interview with Gustavo Gutiérrez entitled *Criticism Will Deepen*,

<sup>108</sup> LA REPUBBLICA, Sept. 9–10, 1984, at 5.

<sup>109</sup> DE STANDAARD, Sept. 12, 1984, at 2.

<sup>110</sup> Letter from Karl Rahner to Cardinal Juan Landázuri Ricketts of Lima, Peru (Mar. 16, 1984), in LIBERATION THEOLOGY, *supra* note 51, at 351–52.

<sup>111</sup> See LIBERATION THEOLOGY, *supra* note 51.

<sup>112</sup> PEDRO CASALDÁLIGA, IN PURSUIT OF THE KINGDOM: WRITINGS 1968–1988, at 231 (Phillip Berryman trans., 1990); see *id.* (discussing Pope John Paul's separation from the 1984 C.D.F. instruction).

*Clarify Liberation Theology.* Gutiérrez defended the use of Marxist analysis as a "methodological pointer"<sup>113</sup>:

It is necessary to be very clear on this point: to deal with the poverty—the inhuman poverty, as Puebla said—lived by the great majority of the inhabitants of our country, and to shed the light of the Gospel on it, we must attain the most exact understanding available of the causes of this situation of poverty. It is necessary to make use of whatever tools human thought offers to help us understand our social reality.<sup>114</sup>

Even one of the more respected liberation theologians, Ronaldo Muñoz, was forced to concede that "the Christian-Marxist confrontation . . . was not always carried out with sufficient maturity and critical awareness."<sup>115</sup>

By 1984, liberation theology and one of its centerpieces—the "preferential option for the poor"—appeared poised to enter a new stage. Chastened during the papal visits to Mexico and Central America, and rebuked by the underlying thrust of the first instruction composed by the Congregation for the Doctrine of the Faith, liberation theologians sought to move away from this earlier, Marxist-influenced phase—with its concomitant revolutionary rhetoric—and toward a greater focus on biblical and ecclesial themes. Such emphases were explicitly within the mainstream of official Catholic social thought. Liberation theologians also began to emphasize the importance of remaining in communion with the institutional hierarchical Church, especially from the perspective of grassroots communities.<sup>116</sup> The hierarchy reciprocated this evolving, more conciliatory trend, as evidenced by the public pronouncements of Pope John Paul, the final document of the 1985 Synod, and the 1986 instruction of the CDF on liberation theology. John Paul's expansive travels and first-hand interaction with the poor of underdeveloped nations contributed vastly to the ongoing refinement of his own views toward the option for the poor as an option for the Universal

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<sup>113</sup> Gutiérrez, *supra* note 105, at 421.

<sup>114</sup> *Id.* Interestingly, Gutiérrez's later summer school offerings on liberation theology completely eliminated Marxist reference works, whereas his initial courses contained dozens of pages of references to such materials.

<sup>115</sup> Muñoz, *supra* note 105, at 239.

<sup>116</sup> See ALFRED HENNELLY, *THEOLOGY FOR A LIBERATING CHURCH: THE NEW PRAXIS OF FREEDOM 81-94* (1989) (discussing the phenomena of Basic Ecclesial Communities ("BECs")).

Church.<sup>117</sup> While he did not explicitly use the term “preferential option for the poor” in his Toronto address on September 14, 1984, John Paul affirmed many of the central facets of Latin American liberation theology therein:

[T]he needs of the poor must take priority over the desires of the rich; the rights of workers over the maximization of profits; the preservation of the environment over uncontrolled industrial expansion; production to meet social needs over production for military purposes.<sup>118</sup>

As Jean-Yves Calvez suggested, over the course of this same period of time occurred “something less known, not sufficiently known, namely, that the Pope, in a whole series of addresses in 1984–1985, was rather chagrined that he could have given the impression of not believing in the preferential option for the poor, or of not believing in it very strongly.”<sup>119</sup> John Paul addressed this issue directly with a group of cardinals and bishops of the Roman Curia assembled at the Vatican on December 21, 1984:

The “option” which today is stressed particularly strongly by the episcopates of Latin America, has been repeatedly confirmed by me . . . . I gladly take this opportunity to repeat that the commitment to the poor constitutes a dominant theme of my pastoral activity, the constant concern which accompanies my daily service to the People of God. I have made and I continue to make this “option” mine, I identify myself with it. And I feel that it could not be otherwise, since this is the Gospel’s eternal message: this is what Christ did, this is what Christ’s Apostles did, this is what the Church has done throughout her two-millennium history.<sup>120</sup>

<sup>117</sup> His early trips to Latin America and the Caribbean Basin were particularly significant in this respect: Mexico in 1979, Brazil in 1980, Haiti in 1983, Peru and Ecuador in 1985, and Colombia in 1986.

<sup>118</sup> John Paul II, Address to Leaders of Christian Communions in Toronto, Christian Unity in a Technological Age (Sept. 14, 1984), in 14 ORIGINS 248, 249 (1984). John Paul directly cited material in this quotation from the Canadian Conference of Catholic Bishops’ pastoral letter on the economy. See generally Edward van Merrienboer, *The Poor as a Pastoral Option for Western Europe*, 69 NEW BLACKFRIARS 56, 56–61 (1988) (assessing the impact of the option for the poor in Western Europe).

<sup>119</sup> Jean-Yves Calvez, *The Preferential Option for the Poor: Where Does It Come from for Us?*, in THE DISTURBING SUBJECT: THE OPTION FOR THE POOR 23 (John W. Padberg ed., 1989).

<sup>120</sup> John Paul II, Discourse to the Cardinals and Prelates of the Roman Curia (Dec. 21, 1984), in L’OSSERVATORE ROMANO, Jan. 21, 1985, at 8.

On October 4, 1984—during the feast of St. Francis of Assisi—Pope John Paul told a group of Peruvian bishops assembled in Rome for their quinquennial *ad limina* visit:

Reassure fully the members of your dioceses who work for the poor in an ecclesial and evangelical spirit, that the Church intends to maintain its preferential option for the poor and encourages the engagement of those who, faithful to the directives of the hierarchy, devote themselves selflessly to those most in need. That is an integral part of their mission.<sup>121</sup>

A few weeks later, he reminded a group of Paraguayan bishops during their *ad limina* visit that "[i]t is true that the precept to love all men and women admits no exclusion, but it does admit a privileged engagement in favor of the poorest."<sup>122</sup> Similarly, in his Christmas message of 1984, John Paul stated that "[w]e affirm our solidarity with the poor of the modern world."<sup>123</sup>

In July of 1986, as John Paul addressed an assembly of Colombian priests, he declared:

[T]he options and the illumination Christians need in the area of human promotion and liberation, especially that of the very neediest, can only be made according to the example of Jesus and obtained in the light of the Gospel, which forbids recourse to methods of hatred and violence. Love, and a preferential option for the poor, must not be exclusive or excluding. Love for the poor does not mean regarding the poor as a class, let alone as a class caught up in a struggle, or as a Church separated from communion with and obedience to the shepherds appointed for them by Christ. Love, and the preferential option for the poor, must be implemented in the context of a conceptualization of the human being in his or her earthly and eternal calling.<sup>124</sup>

In December of 1986, at Castelgondolfo, John Paul addressed an Italian lay dedicated to the social apostolate—the "Community of San Egidio"—in words that once again explicitly affirmed the "preferential option for the poor":

<sup>121</sup> John Paul II, Discourse to the Peruvian Bishops on Their *Ad Limina* Visit to Rome (Oct. 4, 1984), in *L'OSSERVATORE ROMANO*, Oct. 5, 1984, at 1.

<sup>122</sup> John Paul II, Discourse to the Paraguayan Bishops on Their *Ad Limina* Visit to Rome (Nov. 15, 1984), in 22 *LA DOCUMENTATION CATHOLIQUE* 1158, 1159 (1984).

<sup>123</sup> John Paul II, Christmas Message (Dec. 25, 1984), in 14 *ORIGINS* 496, 496–97 (1985).

<sup>124</sup> John Paul II, Address to the Priests of Colombia at Medellín (July 5, 1986), in 78 *ACTA APOSTOLICAE SEDIS* 857, 859 (Sept. 2, 1986).

Today this option is discussed above all in Latin America. But it is also discussed with regard to the Universal Church, as the . . . [1985] Synod of Bishops confirmed. But today this option is discussed and reaffirmed in a new context. The option for the poor is the choice of the Gospel: it is the option of Christ and for Christ. His own choice was exactly that: an option for the poor. And the option for the poor is at the same time an option for Christ, in whatever century, in whatever situation, in whatever country it is made. This we know well. . . .<sup>125</sup>

John Paul convoked an extraordinary session of the Synod of Bishops to meet from November 25 through December 8, 1985, on the occasion of the twentieth anniversary of the closing of the Second Vatican Council; its aim was to reflect upon the Council's meaning, implementation, and effects. To alleviate fears that he might turn back the clock on its reforms, as John Paul convoked the Synod he declared that Vatican II "remains the fundamental event in the life of the contemporary Church," and served for him personally as "the constant reference point of every pastoral action."<sup>126</sup> The view that the theme of "restoration"<sup>127</sup> would dominate the Synod was widely shared, especially when the Pope delegated much of the responsibility for shaping its agenda to the Prefect of the Congregation for the Doctrine of the Faith, Cardinal Joseph Ratzinger, in light of a perceived shift—then current—in the appointment of conservative prelates and the crackdown on seminary faculties.<sup>128</sup> Ratzinger—the renowned German theologian—was appointed to head the congregation by John Paul in January of 1982.<sup>129</sup> Elected to succeed Pope John Paul II as Pope Benedict XVI in April of 2005, Cardinal

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<sup>125</sup> John Paul II, Address to the *Comunitadi S. Egidio* (Dec. 14, 1986), in *L'OSSERVATORE ROMANO*, Dec. 15, 1986, at 6–8.

<sup>126</sup> DULLES, *supra* note 19, at 5.

<sup>127</sup> For a broad overview of the meaning of "restoration," see generally JOHNSON, *supra* note 9, and GIANCARLO ZIZOLA, *LA RESTAUZIONE DI PAPA WOJTYLA* (1985), for a conservative and liberal perspective, respectively.

<sup>128</sup> See WILLEY, *supra* note 1, at 120, 122.

<sup>129</sup> In 2002, John Paul II also approved Ratzinger's election to the position of "Dean of the College of Cardinals," a largely honorific title with responsibilities incumbent upon the role following the death of the Pope and the election of his successor. See Press Release, Holy See Press Office, Biographical Notes: Card. Joseph Ratzinger (Mar. 20, 2005), available at [http://www.vatican.va/news\\_services/press/documentazione/documents/cardinali\\_biografie/cardinali\\_bio\\_ratzinger\\_j\\_en.html](http://www.vatican.va/news_services/press/documentazione/documents/cardinali_biografie/cardinali_bio_ratzinger_j_en.html). This position—including the exposure it afforded him during the interregnum period and within the papal conclave—helped pave the way for his election as the new Pope.

Ratzinger was already well known for his criticisms of liberation theology and of the purported liturgical excesses that ensued in the wake of Vatican II—especially those detailed in magazine interviews in *30 Giorni*, and later published in book form as *The Ratzinger Report*.<sup>130</sup> This key position enabled him to shape the agenda for the 1985 Synod. When one of the primary Synod co-presidents, the Belgian Primate Cardinal Godfried Danneels, was queried at a press conference as to whether a process of “restoration” was indeed happening, he replied: “The word ‘restoration’ occurs nowhere in the preparatory documents of the Synod. It comes from elsewhere. We are here to have a Synod on the [Second Vatican] Council, not on someone’s book.”<sup>131</sup> Yet upon returning from a pastoral visit to Belgium in May of 1985, Pope John Paul responded to a reporter’s question about the proposed agenda for the Synod with the aside: “Oh, I leave that sort of thing to Cardinal Ratzinger.”<sup>132</sup> Apparently, the Pope later considered some of the negative reactions to Cardinal Ratzinger’s book sufficiently problematic to necessitate effecting some distance between the Cardinal and himself, as indicated during a conversation with an American reporter while flying back to Rome from Africa on August 19, 1985: “What Cardinal Ratzinger says is his own opinion. He is free to express his own opinion. His opinion corresponds to many events, but it cannot be understood in this [meaning] that the Council, Vatican II, was a negative meaning for the Church—no, on the contrary.”<sup>133</sup> Some of the then-surviving guiding lights of the Second Vatican Council—like Cardinal Leo-Josef Suenens—were quick to advance the opinion that a return to the *status quo ante* would be ill-advised and disastrous for the Church: “We must firmly reject the word ‘return’ which would be a repudiation of the Council

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<sup>130</sup> See JOSEPH RATZINGER, *THE RATZINGER REPORT: AN EXCLUSIVE INTERVIEW ON THE STATE OF THE CHURCH* 83–91, 119–34 (Salvator Attanasio & Graham Harrison trans., 1985). During the early years of his papacy, Pope Benedict XVI deliberately avoided the use of the term “the preferential option for the poor.” See Benedict XVI, *Message for the 2007 World Day of Prayer for Peace* (Jan. 1, 2007), ¶ 3, 6, 10, 12, [http://www.vatican.va/holy\\_father/benedict\\_xvi/messages/peace/documents/hf\\_ben-xvi\\_mes\\_20061208\\_xl-world-day-peace\\_en.html](http://www.vatican.va/holy_father/benedict_xvi/messages/peace/documents/hf_ben-xvi_mes_20061208_xl-world-day-peace_en.html) (basing this appeal on human rights and natural law categories).

<sup>131</sup> PETER HEBBLETHWAITE, *SYNOD EXTRAORDINARY: THE INSIDE STORY OF THE ROME SYNOD, NOVEMBER–DECEMBER 1985*, at 110 (1986).

<sup>132</sup> *Id.* at 49 (internal quotation marks omitted).

<sup>133</sup> *Id.* at 52 (quoting from a conversation (in English) between John Paul II and Bill Pritchard of the National Catholic News Service).

and would delight both the confessed and the secret ultra-conservatives."<sup>134</sup>

One manifestation of this ideological battleground appeared in the discussion over the incorporation of the term "preferential option for the poor" within the text of the Synod's "Final Report." Two Brazilian prelates—Bishop José Ivo Lorscheiter, President of the National Conference of Brazilian Bishops, and his cousin, Cardinal Aloisio Lorscheider<sup>135</sup>—were permitted to lodge written interventions with the secretariat of the Synod in which they defended liberation theology. Their position was attacked at a press conference on November 30, 1985, by Bishop Dario Castrillón Hoyos, the Colombian executive secretary of CELAM—and a lieutenant of Cardinal Alfonso Lopez Trujillo, CELAM's president.<sup>136</sup> Cardinal Eugenio de Araujo Sales of Rio de Janeiro also sought to undermine further these written interventions during the Synod. Cardinal Godfried Daneels was entrusted with brokering the final form of the sixteen page Latin language document that became the Synod's "Final Report." In the working draft of the final report—as a summary of the positive achievements of the *Pastoral Constitution on the Church in the Modern World*—he succeeded in retaining a reference to the "preferential option for the poor":

A more profound perception of the relationship between the Church and the world. More radical testimony on the part of the Church in the area of human rights, justice, peace[,] and freedom. Greater sensitivity to social problems. The preferential option for the poor, the oppressed, the outcast has entered into the Church's thought and practice.<sup>137</sup>

As Peter Hebblethwaite noted:

The most remarkable statement is the comment on the 'preferential option for the poor'; for there had been a determined attempt to whittle away this phrase of Medellín and Puebla. . . . [I]t was emasculated still further [in the 1984 CDF instruction on liberation theology] as 'a concern for the poor and

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<sup>134</sup> Cardinal Leo Josef Suenens, *Prospects for the Synod*, TABLET, Oct. 12, 1985, at 1063–64.

<sup>135</sup> Despite the variant spellings of their surnames, they were blood relatives as first cousins. See Warren M. Hoge, *Feuding of Brazil's Church and Military Grows Bitter*, N.Y. TIMES, Dec. 28, 1980, at 10.

<sup>136</sup> See E. J. Dionne Jr., *Bishop Assails Liberation Theology*, N.Y. TIMES, Dec. 1, 1985, at 13.

<sup>137</sup> HEBBLETHWAITE, *supra* note 131, at 112.

the young'—a paternalistic approach which travestied the main point of this language, which was that one should be *with* the poor, not lecturing them from an immense height.<sup>138</sup>

In light of the intramural squabbling within the *Final Report* promulgated by the Synod, it was surprising to find an entire section of the document entitled "Preferential Option for the Poor." In part, it confirmed:

After Vatican II, the Church became more aware of her mission for service of the poor, the oppressed[,] and the marginalized. In this preferential option, which is not to be understood as exclusive, the true spirit of the Gospel shines out. . . . The Church must in prophetic fashion denounce every form of poverty and oppression and defend and support everywhere the fundamental and inalienable rights of the human person.<sup>139</sup>

The concluding section of the Synod's *Final Report* stated: "[W]e should again examine what are the following aims, and how may they be put into practice . . . . [W]hat is a preferential option for the poor[?]"<sup>140</sup> As Avery Dulles pointed out in his commentary on the Synod, under the topic of "Church and World":

[T]he Final Report accepts the "preferential option for the poor" enshrined in the conclusions of the Puebla Conference of 1979 and in many statements of John Paul II. It points out, as do those documents, that this option must not be interpreted as exclusive, as though it were a restriction on the universalism of Christian love. In its efforts to improve the lot of the poor, moreover, the Church must never lose sight of its preeminently spiritual mission.<sup>141</sup>

Pope John Paul readily embraced this vision, declaring the following during the homily at the Synod's closing Mass on December 8, 1985: "The Synod has accomplished the purposes for which it was convoked: to celebrate, verify, and promote the Council."<sup>142</sup> Pope John XXIII's unfulfilled vision of the "Church

<sup>138</sup> *Id.* at 113.

<sup>139</sup> THE SYNOD OF BISHOPS, THE FINAL REPORT (1985), in XAVIER RYNNE, JOHN PAUL'S EXTRAORDINARY SYNOD: A COLLEGIAL ACHIEVEMENT 130 (1986).

<sup>140</sup> *Id.* at 131.

<sup>141</sup> DULLES, *supra* note 19, at 27.

<sup>142</sup> HEBBLETHWAITE, *supra* note 131, at 140 (internal quotation marks omitted). These three phrases—"celebrate," "verify," and "promote"—also appear (in slightly modified form) in THE SYNOD OF BISHOPS, *supra* note 139, at 112.

of the Poor" was affirmed as a priority for the Universal Church, as reflected in the acts of the 1985 Roman Synod.

The eagerly-awaited second, or more "positive," instruction of the Congregation for the Doctrine of the Faith concerning liberation theology—its *Instruction on Christian Freedom and Liberation*—was delayed for publication until the spring of 1986. Over the course of the prior year, Pope John Paul entered into an extensive dialogue with representatives of the Brazilian Church,<sup>143</sup> among others, concerning the theology of liberation. He became increasingly sensitized to their concerns through this process of listening, awareness, and dialogue, all of which marked the intensive discussions in July of 1985 between the steering committee of the Doctrinal Commission of the Brazilian National Bishops' Conference ("CNBB") and the representatives of the CDF.<sup>144</sup> These colloquia were followed by the March of 1986 conversation that John Paul convened with his personal representative, Cardinal Bernadin Gantin, the five Brazilian cardinals, the elected officers of the CNBB, and the chairs of its regional secretariats. Its purpose was to discuss liberation theology, the Boff case, and the forthcoming (second) instruction of the Congregation for the Doctrine of the Faith on liberation theology. Cardinal Ratzinger submitted a draft of this instruction to John Paul for his approval, but the Pope was critical of its style and contents.<sup>145</sup> Pope John Paul found Cardinal Ratzinger's initial draft of the new instruction to be too ethereal and abstract,<sup>146</sup> considered the use of Scripture in the text to be "shallow" and "inadequate," and felt that the text needed to be burnished in order to treat more positively the viable existence of Christian base communities.<sup>147</sup> In this respect, the Pope exerted himself and put his imprint on this document, while also differentiating his viewpoints from those of Cardinal Ratzinger.<sup>148</sup> While the 1986 CDF instruction on

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<sup>143</sup> See COX, *supra* note 105, at 102–03 (discussing the issuance of an official public notification directed at Leonardo Boff, the Brazilian friar).

<sup>144</sup> *Cf. id.* at 108–09.

<sup>145</sup> See *id.* at 114–15 for the relevant details.

<sup>146</sup> See *id.* at 114.

<sup>147</sup> *Id.*

<sup>148</sup> For a lengthy analysis of John Paul's approach to this document, see generally Peter Hebblethwaite, *Spiritual Points in Liberation Themes Basic to the Document: An Analysis*, in LIBERATION THEOLOGY AND THE VATICAN DOCUMENT: PERSPECTIVES FROM THE THIRD WORLD 85–95 (1987).

liberation theology stressed its continuity with its 1984 predecessor, the tone seemed markedly different. In its final form, the second CDF instruction was largely free from the harsh warnings and judgments of its predecessor. John Paul returned it to the CDF for revisions and subsequent approval before its eventual promulgation.<sup>149</sup>

The second instruction on liberation theology was revised by the CDF and released on April 5, 1986. It was widely construed to signal the Vatican's recognition that the main tenets of the theology were both authentically Christian and acceptably orthodox. The instruction committed the Roman Catholic Church to the concept of a "love of preference of the poor," and thereby sought to avoid the perceived problematic overtones of Marxist dialectic and analysis that Rome associated with the term "preferential option for the poor." Its fourth chapter noted the following: "The special option for the poor, far from being a sign of particularism or sectarianism, manifests the universality of the Church's being and mission. This option excludes no one."<sup>150</sup>

Many commentators took this nuanced wording to be of great significance. In a conservative U.S. Catholic newspaper with close ties to the Vatican—The National Catholic Register—Robert Moynihan suggested that

[e]ven small changes in the phrasing of historic church documents can have a great significance. This document is no exception. . . . The change from an *option* for the poor to the *love of preference* for the poor is an intentional effort on the part of the author, Joseph Ratzinger, to move away from a word with political and sociological connotations, toward a concept with a more traditional religious content.<sup>151</sup>

Other observers took a different tack. The more progressive American Jesuit interpreter of liberation theology, Alfred Hennelly, wrote:

With respect to this [terminology] . . . a certain controversy has arisen in press reports concerning the phrase "a love of

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<sup>149</sup> See COX, *supra* note 105, at 114.

<sup>150</sup> CARDINAL JOSEPH RATZINGER, INSTRUCTION ON CHRISTIAN FREEDOM AND LIBERATION ¶ 68 (1986) [hereinafter INSTRUCTION ON CHRISTIAN FREEDOM AND LIBERATION].

<sup>151</sup> Robert Moynihan, *New Vatican Document To Stress a Preferential Love of Poor, but Will Also Urge Reconciliation*, NAT'L CATHOLIC REG., Mar. 23, 1986, at 1.

preference for the poor"; some accounts held that this was replacing the expression "preferential option for the poor," which had come into common usage through the Latin American Bishops' Conference. Supposedly this was done to avoid the potentially divisive effects implied in a "preferential option." However, the phrase "special option for the poor" is used no less than three times in the pertinent section . . . , which clearly refutes the charge that it was being deliberately jettisoned. We may only speculate that the "love of preference" was also used in order to emphasize the Christian motivation of the option.<sup>152</sup>

With the appearance of the *Instruction on Christian Freedom and Liberation*, a development that began during the 1970s and gained currency during the 1980s became even clearer: "[L]iberation theology became increasingly less socio-political and more religious and ecclesial" in its primary orientation.<sup>153</sup> Even the noted Brazilian liberation theologian Leonardo Boff conceded that the *Instruction* gave "a newly universal dimension to values that were initially only those of the Third World. . . . After this, . . . liberation theology will gain a new dimension."<sup>154</sup> In spite of the *Instruction's* aversion to use of the precise terminology "preferential option for the poor," the 1986 CDF document served as something of a watershed work concerning the themes of liberation theology for the whole Church. As Alfred Hennelly noted:

[T]he document was well worth waiting for. Despite a loud chorus of criticism from various sources, it eminently succeeds in providing an excellent brief synthesis of the major themes of a liberation theology. Thus we now have a formal Vatican endorsement (with all the necessary caveats and provisos) of the liberation approach, not merely for Latin America or other parts of the third world, but for the universal church.<sup>155</sup>

The 1986 instruction demonstrated a remarkable realignment of the Vatican's position on the theology of liberation, a veritable "about face" from the hard-line adopted by Cardinal Ratzinger and his congregation only two years earlier. For their

<sup>152</sup> Alfred T. Hennelly, *The Red-Hot Issue: Liberation Theology*, 154 AMERICA 425, 426 (1986).

<sup>153</sup> José Comblin, *The Church and Defence of Human Rights*, in THE CHURCH IN LATIN AMERICA: 1492–1992, at 435, 448 (Enrique Dussel ed., 1992).

<sup>154</sup> COX, *supra* note 105, at 115 (internal quotation marks omitted).

<sup>155</sup> Hennelly, *supra* note 152, at 425.

own part, liberation theologians moderated their rhetoric and distanced themselves increasingly from the tools of Marxist analysis. The tensions brewing between the progressive wing of the Latin American Church and the Vatican also eased markedly with a letter from Pope John Paul II addressed to the bishops of Brazil, in which the Holy Father charged the CNBB with a special mission to help guide the development of liberation theology not only in Brazil, but throughout all of Latin America.<sup>156</sup> Cardinal Bernadin Gantin of Benin personally presented and read aloud the letter to the Brazilian bishops on the Pope's behalf on April 12, 1986, the week after publication of the CDF's second instruction. The Pope situated the thrust of the letter to the Brazilian hierarchy within the context of the prior CDF instructions:

An expression and proof of the attention with which the Holy See participates in [the service of the poor] are the numerous documents recently published, among them the two Instructions provided by the Congregation for the Doctrine of the Faith, with my explicit approval: one, regarding certain aspects of the theology of liberation (*Libertatis Nuntius* of August 6, 1984); the other, on Christian freedom and liberation (*Libertatis Conscientia* of March 22, 1986). These latter two, addressed to the Universal Church, have an undeniable pastoral relevancy for Brazil.<sup>157</sup>

In an earlier section of the same letter directed to the Brazilian bishops, the Pope adverted to their special role—in addition to that of the entire Brazilian Church—in the life of the Universal Church:

[I]n this area also the church, led by you, the bishops of Brazil, gives signs of being identified with the people, especially the poor, the suffering, those without influence, resources, and assistance. The church consecrates itself to these with a love that is neither exclusive nor excluding but rather preferential.<sup>158</sup>

He emphasized this point elsewhere in the text:

May God help you to be unceasingly watchful so that a correct and necessary theology of liberation can develop in Brazil and in

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<sup>156</sup> See generally John Paul II, Letter to Brazilian Episcopal Conference (Apr. 9, 1986), in *LIBERATION THEOLOGY*, *supra* note 51, at 498–506.

<sup>157</sup> *Id.* at 503.

<sup>158</sup> *Id.* at 501–02.

Latin America in a homogenous and not heterogeneous fashion with relation to the theology of all times, in full fidelity to church doctrine, attentive to a preferential but not excluding or exclusive love for the poor.<sup>159</sup>

Perhaps the most striking element of John Paul's communiqué is contained in the following section:

[W]e are convinced, we and you, that the theology of liberation is not only timely but useful and necessary. It should constitute a new state—in close connection with former ones—of the theological reflection initiated with the apostolic tradition and continued by the great fathers and doctors, by the ordinary and extraordinary magisterium and, in more recent years, by the rich patrimony of the Church's social doctrine, expressed in documents from *Rerum Novarum* to *Laborem Exercens*.<sup>160</sup>

In light of the contentious atmosphere that marked the prior half decade of the debate over liberation theology, the assembled Brazilian bishops burst into a spontaneous, sustained chorus of "Alleluias" the moment Cardinal Gantin finished reading the letter. The bishops were relieved, realizing the harmonious tack and strong affirmation of the central tenets of liberation theology conveyed by John Paul through the letter.

In his sixth encyclical, dated March 25, 1987, *Redemptoris Mater*, John Paul again avoided using the term "preferential option for the poor" in an official document. He substituted instead the phrases "love of preference for the poor," "love of preference for the poor and humble," and "the 'option in favor of the poor.'"<sup>161</sup> In this letter—fashioned to designate a special Marian "Holy Year"—the Pope stressed that the Church has a "duty to safeguard carefully the importance of 'the poor' and of 'the option in favor of the poor' in the word of the living God. These are matters and questions intimately connected with the Christian meaning of freedom and liberation."<sup>162</sup> He continued this practice in his second social encyclical, *Sollicitudo Rei Socialis*, dated December 30, 1987, written to commemorate the twentieth anniversary of *Populorum Progressio*.<sup>163</sup> John Paul

<sup>159</sup> *Id.* at 504.

<sup>160</sup> *Id.* at 503.

<sup>161</sup> JOHN PAUL II, ENCYCLICAL LETTER *REDEMPTORIS MATER* ¶ 37 (1987).

<sup>162</sup> *Id.*

<sup>163</sup> See *SOLLICITUDO REI SOCIALIS*, *supra* note 41, ¶ 47; see also PETER J. HENRIOT, OPTING FOR THE POOR: A CHALLENGE FOR NORTH AMERICANS 22 (1990) (stating that John Paul's "choice of 'love' over 'option' softens the conflict inherent in choosing

indicated that the purpose of the letter was to meet the need for "a fuller and more nuanced concept of development;" along the lines of *Populorum Progressio*, he linked together "development" and "liberation" in the body of the text, and asserted that "the process of development and liberation takes concrete shape in the exercise of solidarity."<sup>164</sup> In this document, the Pope denounced the practice of both "Marxist collectivism" and "liberal capitalism" as increasing the impoverishment of poor nations—especially those in the Southern Hemisphere—in the lust for power and profits.<sup>165</sup> He cautiously adverted to the phenomenon of liberation theology:

[A] new way of confronting the problems of poverty and underdevelopment has spread in some areas of the world, especially in Latin America. This approach makes liberation the fundamental category and the first principle of action. The positive values, as well as the deviations and risks of deviation, which are damaging to the faith and are connected with this form of theological reflection and method, have been appropriately pointed out.<sup>166</sup>

In terms consonant with liberation theology, John Paul presented the concept of social sin both in the context of theological and social analysis: "[H]idden behind certain decisions, apparently inspired only by economics or politics, are real forms of idolatry: of money, ideology, class, technology."<sup>167</sup> The notion of the "option for the poor" received treatment in two paragraphs of this encyclical. In line with "the worldwide dimension which the social question has assumed," the Pope twice advocated this "love of preference for the poor."<sup>168</sup> As John Paul stated:

This is an option, or a special form of primacy in the exercise of Christian charity, to which the whole tradition of the Church bears witness. It affects the life of each Christian inasmuch as he or she seeks to imitate the life of Christ, but it applies equally to our social responsibilities and hence to our manner of

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sides. . . [though] he may thereby weaken the Gospel force of the call here").

<sup>164</sup> *SOLLICITUDO REI SOCIALIS*, *supra* note 41, ¶¶ 4, 46.

<sup>165</sup> *See id.* ¶¶ 20–21.

<sup>166</sup> *Id.* ¶ 46.

<sup>167</sup> *Id.* ¶ 37.

<sup>168</sup> *Id.* ¶¶ 42, 47.

living, and to the logical decisions to be made concerning the ownership and use of goods.<sup>169</sup>

In this respect, as Gustavo Gutiérrez noted, “[s]ome have claimed that the magisterium would be happy to see the expression *preferential option* replaced with *preferential love*, which, we are told, would change the meaning. It seems to us that the matter has been settled by the latest encyclical [*Sollicitudo Rei Socialis*] of John Paul II.”<sup>170</sup> Rocco Buttiglione—an Italian political philosopher with close ties to the Vatican—stated of *Sollicitudo Rei Socialis*: “This encyclical offers a new liberation theology. . . . It is a new Liberation Theology that surpasses the limits of the old one that is so thoroughly grounded in the Latin American experience[,] and it is a theology that knows Communists.”<sup>171</sup> But even bellwether theologians of liberation like Gustavo Gutiérrez—the “godfather of liberation theology”—hailed the encyclical as a confirmation of their established positions, such as the concern with unjust social structures, the call for liberation, and the embrace of a love of preference for the poor.<sup>172</sup> This linkage by Gutiérrez apparently disturbed John Paul so thoroughly that—during his brief pastoral visit to Peru several weeks later—he restated his criticisms of certain aspects of liberation theology, without specifically condemning by name any of its individual practitioners. The Pope also decried his impression that the warnings of the two CDF instructions had caused little impact on the “persistent error” that led some to act as if their application “were addressed to others.”<sup>173</sup> John Paul seemed not quite ready to abandon his own suspicion of the excesses that existed among liberation theologians, though he embraced the general direction of its tenets.

On December 7, 1990, John Paul issued an important encyclical about missionary activity: *Redemptoris Missio*.<sup>174</sup> Near

<sup>169</sup> *Id.* ¶ 42.

<sup>170</sup> Gutiérrez, *supra* note 7, at 240.

<sup>171</sup> Roberto Suro, *The Writing of an Encyclical, in ASPIRING TO FREEDOM: COMMENTARIES ON JOHN PAUL II'S ENCYCLICAL THE SOCIAL CONCERNS OF THE CHURCH* 159, 162–63 (Kenneth A. Myers ed., 1988) (quoting ROCCO BUTTIGLIONE, KAROL WOJTYLA: THE THOUGHT OF THE MAN WHO BECAME POPE JOHN PAUL II (Paolo Guietti & Francesca Murphy trans., 1997).

<sup>172</sup> See LATINAMERICA PRESS, May 5, 1988, at 2.

<sup>173</sup> *Id.* at 1.

<sup>174</sup> See *REDEMPTORIS MISSIO*, *supra* note 13.

the end of the text, he emphasized that the "option for the poor" included aspects of both evangelization and "hands on" social ministry:

It is not right to give an incomplete picture of missionary activity, as if it consisted principally in helping the poor, contributing to the liberation of the oppressed, promoting development[,] or defending human rights. The missionary Church is certainly involved on these fronts[,] but her primary task lies elsewhere: the poor are hungry for God, not just for bread and freedom.<sup>175</sup>

This encyclical echoed the Pope's declaration both in *Laborem Exercens* and during his first visit to Brazil<sup>176</sup> that the Church throughout the world wishes to be "the Church of the poor." It placed the weight of the Pope's teaching authority in line with the Puebla pronouncements that "the poor deserve preferential attention . . . . God has become their defender and loves them. It follows that the poor are those to whom the mission is first addressed, and their evangelization is *par excellence* the sign and proof of the mission of Jesus."<sup>177</sup> Earlier in this same document, John Paul repeated the same concern:

It is true the 'option for the neediest' means that we should not overlook the most abandoned and isolated human groups, but it is also true that individuals or small groups cannot be evangelized if we neglect the centers where a new humanity, so to speak, is emerging, and where new models of development are taking shape.<sup>178</sup>

As he noted, the Church's "mission consists essentially in offering people an opportunity not to 'have more' but to 'be more' by awakening their consciences through the Gospel. 'Authentic human development must be rooted in an ever deeper evangelization.'<sup>179</sup> The encyclical indicated that the mission of the Church was not "to work directly on the economic, technical[,] or political level," i.e., in effecting change on the structural rather

<sup>175</sup> *Id.* ¶ 83.

<sup>176</sup> See *LABOREM EXERCENS*, *supra* note 38, ¶ 8; see also John Paul II, Address to the Residents of Favela Vidigal in Rio de Janeiro (July 2, 1980), in 72 ACTA APOSTOLICAE SEDIS 852, 854 (1980).

<sup>177</sup> *REDEMPTORIS MISSIO*, *supra* note 13, ¶ 60 (quoting Final Document, *supra* note 32, ¶ 1142).

<sup>178</sup> *Id.* ¶ 37.

<sup>179</sup> *Id.* ¶ 58 (quoting Address to Clergy and Religious Leaders, Jakarta, Indonesia (July 2, 1989), in *L'OSSERVATORE ROMANO*, Oct. 11, 1989, at 1).

than the individual level, but instead aimed for a kind of human development that “leads to conversion of heart and of ways of thinking, fosters the recognition of each person’s dignity, [and] encourages solidarity . . . and service of one’s neighbor . . . .”<sup>180</sup>

During his first overseas trip, Pope John Paul II met with peasant Mexican farmers in Culicán, Oaxaca, on January 29, 1979. He reassured them of their “right to effective help, which is neither a handout nor a few crumbs of justice, so that they may have access to the development that their dignity as human beings and as children of God merits.”<sup>181</sup> During the latter years of his pontificate, John Paul II magnified the call for a structural response to the needs of poor and oppressed people throughout the world. In 1999, he stated that the magisterium of the Church in the modern era insisted

more and more upon the need to promote the authentic and integral development of the human person, this[] in response to the real situation of the world’s peoples as well as to an increased consciousness that not just the actions of individuals[,] but also structures of social, political[,] and economic life are often inimical to human well-being.<sup>182</sup>

He continued this trajectory of underscoring the need for radical personal, communal, societal, and global structural changes designed to counter these harsh realities: “The imbalances entrenched in the increasing gap between those who benefit from the world’s growing capacity to produce wealth and those who are left at the margin of progress call for a radical change of both mentality and structures in favor of the human person.”<sup>183</sup>

John Paul II demonstrated a breakthrough by his appropriation of the term “preferential option for the poor” for the final time in a major Church document in his May of 1991

<sup>180</sup> *Id.* ¶¶ 58–59. Certain critics scored this approach as giving the Church too privatistic and dualistic an appearance, contrary to the 1975 teachings displayed in PAUL VI, APOSTOLIC EXHORTATION *EVANGELII NUNTIANDI* ¶¶ 18–20 (addressing the need for changes in the economic and social structures of the world, in addition to the transformation of culture). *See, e.g.,* DORR, *supra* note 7, at 338–39.

<sup>181</sup> Robert J. Vitello, *Recent Papal Teachings on Rural Development*, 14 CATHOLIC CHARITIES USA 10 (1987); *see* James A. Donahue, *The Social Theology of John Paul II and His Understanding of Social Institutions*, 13 SOCIAL THOUGHT 20, 26 (1987) (noting John Paul II’s insistence that all human institutions serve human rights and dignity).

<sup>182</sup> JOHN PAUL II, APOSTOLIC EXHORTATION *ECCLESIA IN ASIA* ¶ 32, in 29 ORIGINS 357, 375 (1999).

<sup>183</sup> *Id.*

social encyclical, *Centesimus Annus*;<sup>184</sup> its application was both unambiguous and definitive. Within the framework of this letter, John Paul located the Church's "social doctrine" within the mainstream of the tradition, and stated that it formed "an essential part of the Christian message."<sup>185</sup> Specifically, he commented upon

*the Church's constant concern for and dedication to categories of people who are especially beloved to the Lord Jesus. The content of the text [of Rerum Novarum] is an excellent testimony to the continuity within the Church of the so-called "preferential option for the poor", an option which I defined as a "special form of primacy in the exercise of Christian charity."*<sup>186</sup>

Later in the text, John Paul II echoed the teaching of Pope Paul VI in his 1975 "Apostolic Exhortation," *Evangelii Nuntiandi*:

[T]he social message of the Gospel must not be considered a theory, but above all else a basis and a motivation for action. . . . Today more than ever, the Church is aware that her social message will gain credibility more immediately from the *witness of actions* than as a result of its internal logic and consistency. This awareness is also a source of her preferential option for the poor, which is never exclusive or discriminatory towards other groups. This option is not limited to material poverty, since it is well known that there are many other forms of poverty, especially in modern society—not only economic but cultural and spiritual poverty as well.<sup>187</sup>

John Paul II concluded: "Love for others, and in the first place love for the poor, in whom the Church sees Christ himself, is made concrete in the *promotion of justice*."<sup>188</sup> In *Centesimus Annus*, the Pope operated in a new key, exerting a distinct kind of ownership over the term "preferential option for the poor," a phrase that was specifically appropriated for the first time in an encyclical—a papal teaching document of high magnitude—in paragraphs 11 and 57.<sup>189</sup>

<sup>184</sup> See *CENTESIMUS ANNUS*, *supra* note 13, ¶ 11. This encyclical was issued to coincide with the one-hundredth anniversary of Pope Leo XIII's *Rerum Novarum*—which appeared on May 15, 1891—and to celebrate one hundred years of modern Catholic social teaching. See *id.* ¶ 1.

<sup>185</sup> *Id.* ¶ 5.

<sup>186</sup> *Id.* ¶ 11 (quoting *SOLLICITUDO REI SOCIALIS*, *supra* note 13, ¶ 42).

<sup>187</sup> *Id.* ¶ 57.

<sup>188</sup> *Id.* ¶ 58.

<sup>189</sup> See *id.* ¶¶ 11, 57.

The fourth major Latin American Bishops' Conference plenary meeting occurred in the Dominican capital of Santo Domingo, from October 12–28, 1992.<sup>190</sup> For the second time in his pontificate, John Paul attended a plenary conference for the bishops of Latin America and the Caribbean. His presence was keenly felt in both the preparatory phases and in the outcome of the "Final Document," in which the notion of the "preferential option for the poor" received strong papal and episcopal endorsement. The overall impact and reception of the final documents of the CELAM IV conference at Santo Domingo were mixed. As Alfred Hennelly observed,

this meeting was certainly not a leap forward nor an elegant step forward. Rather, it could only be called a *shaky step* into the future. . . . I believe the Final Document was led by the Spirit of God to employ the biblical parable of the wheat and the weeds, with both fruitful and worthless results . . . .<sup>191</sup>

A lack of sufficient pre-conference consultation and a lamentable degree of factionalism<sup>192</sup> caused one group of Latin American theologians to opine: "Medellín turned out a text greater than its participants. The Puebla document was similar to the assembly which produced it; and the Santo Domingo document turned out to be inferior to its authors and to the Church that they represent."<sup>193</sup>

In his "Opening Address to the Bishops of Latin America" at the 1992 Santo Domingo CELAM IV conference, Pope John Paul emphasized:

In continuity with the Medellín and Puebla conferences, the church reaffirms the preferential option for the poor. That option is not exclusive or excluding, since the message of salvation is intended for all. It is "an option, moreover, that is

<sup>190</sup> For the principal texts of the conference, see generally Secretariat, *Bishops' Committee for the Church in Latin America*, in CATHOLIC FUND FOR OVERSEAS DEVELOPMENT, *SANTO DOMINGO CONCLUSIONS: FOURTH GENERAL CONFERENCE OF LATIN AMERICAN BISHOPS, OCTOBER 12–28, at 1992* (1993).

<sup>191</sup> Alfred T. Hennelly, *A Report from the Conference*, in *SANTO DOMINGO AND BEYOND*, *supra* note 18, at 24.

<sup>192</sup> See Francis McDonagh, *Legacy of Santo Domingo*, *TABLET*, Nov. 21, 1992, at 1489; Peter Steinfels, *CELAM & the Vatican: Preferential Option for Dickering*, *COMMONWEAL*, Nov. 20, 1992, at 5–6.

<sup>193</sup> Guillermo Cook, *Santo Domingo Through Protestant Eyes*, in *SANTO DOMINGO AND BEYOND*, *supra* note 18, at 184, 186 (quoting José Marins, Teo Trevisan & Carolee Chanona, *The Ecclesial Process of Latin America: The Assembly and the Document of Santo Domingo*, at 5 (1993) (unpublished paper)).

based essentially on God's word, and not on criteria provided by human sciences or opposed ideologies, which often reduce the poor to abstract sociopolitical and economic categories."<sup>194</sup>

A few moments later, the Pope reiterated this same point: "There is no genuine human development, true liberation, or preferential option for the poor unless it is based on the very foundations of the dignity of the person and of the surroundings in which the person must develop, according to the Creator's design."<sup>195</sup>

Part II of the CELAM IV "Final Document" was entitled *Jesus Christ: Evangelizer Living in His Church*. In its chapter addressing human development, the Latin American bishops wrote that the "New Evangelization" served as

the basis for our commitment to a gospel-based and preferential option for the poor, one that is firm and irrevocable but not exclusive or excluding, as was very solemnly affirmed at the Medellín and Puebla Conferences. . . . The poor Church wants to energize the evangelization of our communities with the "evangelizing potential of the poor."<sup>196</sup>

The succeeding paragraph emphasized a similar point:

The Church, which is called to be ever more faithful to its preferential option for the poor, has played a growing role in such efforts. For that we thank God, and we urge that the path already opened be widened, since there are many more who have yet to tread on it.<sup>197</sup>

This text adopted as a "Pastoral Guideline" the need to "[a]ssume with renewed decision the gospel-inspired and preferential option for the poor, following the example and the words of the Lord Jesus . . ."<sup>198</sup> Finally, in the "Conclusions" of the "Final Document"—under the heading "Primary Pastoral Directions"—the Latin American bishops stressed:

*We make ours the cry of the poor.* In continuity with Medellín and Puebla, we assume with renewed ardor the gospel preferential option for the poor. This option, which is neither

<sup>194</sup> Santo Domingo Opening Address, *supra* note 18, ¶ 16 (partially quoting Pope John Paul II, Discourse to the Cardinals and Prelates of the Roman Curia (Dec. 21, 1984), ¶ 4); see Address to the Bishops of Latin America, *supra* note 55, at 6–8.

<sup>195</sup> Santo Domingo Opening Address, *supra* note 18, ¶ 18.

<sup>196</sup> CONCLUSIONS, *supra* note 21, at 122 (partially quoting Final Document, *supra* note 32, ¶ 1147) (citation omitted).

<sup>197</sup> *Id.* at 123.

<sup>198</sup> *Id.*

exclusive nor excluding, will, in imitation of Jesus Christ, shed light on all our evangelization activity.

With that light, we urge the development of a new economic, social, and political order in keeping with the dignity of each and every person, fostering justice and solidarity, and opening horizons of eternity for all of them.<sup>199</sup>

In his assessment of this segment of the Santo Domingo "Final Document," Francis McDonagh commented: "The commitments of this section are expressed in one paragraph in terms which could stand with any from the previous conferences."<sup>200</sup> As the text quoted above indicates, the CELAM IV conference at Santo Domingo resoundingly affirmed the notion of the "preferential option for the poor"—which John Paul described as "firm and irrevocable"—and provided a yardstick for "the measure of our following Christ." The "option for the poor" was taken as an interpretive focus and unifying principle for the Santo Domingo documents, in continuity with that formerly professed at both Medellín and Puebla.

As Jon Sobrino wrote:

[T]he Latin American church must go on living by the spirit of Medellín [i.e., committed to a preferential option for the poor], not out of choice, but because there is not yet anything better. This does not mean of course that the church has no new agendas, but rather that it is very dangerous to emphasize the need for newness, when for the most part that newness has been a reality in the church since Medellín.<sup>201</sup>

Sobrino stressed the imprudence of attempting to jettison or to re-invent the "preferential option for the poor," since the reality it represents is so deeply embedded in the values inherent in the Scriptures and in the Christian tradition; in addition, "there is not yet anything better"<sup>202</sup> to supplant it.

A further indication of the impact of this concept on John Paul's evolving social thought was reflected in his selection of the theme—"If you want peace, reach out to the poor"—as the text for the Pope's *World Day of Peace Message* to "the City and to the World" on January 1, 1993. As the Chief Shepherd of the Diocese of Rome, Pope John Paul was profoundly aware that the "Eternal

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<sup>199</sup> *Id.* at 153.

<sup>200</sup> McDonagh, *supra* note 192, at 1489.

<sup>201</sup> Jon Sobrino, *The Winds in Santo Domingo and the Evangelization of Culture*, in Hennelly, *supra* note 191, at 167, 181.

<sup>202</sup> *Id.* at 181.

City" had increasingly come to resemble a "Third World" capital near the turn of the twenty-first century, with its burgeoning numbers of homeless, unemployed migrants, and refugee population, particularly from equatorial Africa, Albania, and Kosovo. He told Mayor Pietro Giubilo:

Rome is a city with two faces. Next to immense treasures of religious, cultural, and human wealth may be observed sectors of multiple moral ills; corners of the Third World; points of great wealth and pockets of great poverty. There are the few who possess much, and the many who possess little.<sup>203</sup>

On that same day, John Paul's address emphasized the value of freely chosen "[e]vangelical poverty" as "something that transforms those who accept it. They cannot remain indifferent when faced with the suffering of the poor; indeed, they feel impelled to share actively with God his preferential love for them."<sup>204</sup> He concluded by paraphrasing the familiar sobriquet of Pope Paul VI from *Populorum Progressio*<sup>205</sup>: "If you want peace, reach out to the poor!"<sup>206</sup>

The ongoing process of listening, awareness, and dialogue that marked the development of the concept of the "preferential option for the poor" achieved a depth of maturity and a degree of official acceptance during the pontificate of John Paul II, ensuring it a secure place within the corpus of official Catholic social doctrine. In the end, Pope John Paul II pronounced liberation theology as "necessary" for the Church,<sup>207</sup> a concession accorded by the second *Instruction on Christian Freedom and Liberation* issued by the Congregation for the Doctrine of the Faith, *Libertatis Conscientia*: "[T]he quest for freedom and the aspiration to liberation . . . are among the principal signs of the times in the modern world."<sup>208</sup> Later, even Cardinal Joseph Ratzinger concurred: "[W]e Christians cannot choose or decline this option at our discretion. Rather, it is a requirement flowing

<sup>203</sup> WILLEY, *supra* note 1, at 201–02.

<sup>204</sup> John Paul II, Message for the 1993 World Day of Prayer for Peace (Dec. 8, 1992), ¶ 5 [hereinafter 1993 Message].

<sup>205</sup> See PAUL VI, ENCYCLICAL LETTER *POPULORUM PROGRESSIO* ¶ 83 (1967) ("We look to all men of good will, reminding them that civil progress and economic development are the only road to peace.").

<sup>206</sup> 1993 Message, *supra* note 204, ¶ 2 (internal quotation marks omitted).

<sup>207</sup> See John Paul II, Exhortation to the Representatives of the Brazilian National Bishops' Conference (Mar. 13, 1986).

<sup>208</sup> INSTRUCTION ON CHRISTIAN FREEDOM AND LIBERATION, *supra* note 150, ¶ 5.

from the essential core of the Gospel itself. Jesus' life is the best interpretation of the motive and meaning of the option for the poor."<sup>209</sup>

While the Compendium of the Social Doctrine of the Church issued by the Pontifical Council *Iustitia et Pax*—and published during the final days of Pope John Paul II's papacy—included the term “preferential option for the poor” only once—and failed to index it within the 181 pages of references—the phrase merited a bold-faced listing under the sub-heading “The Universal Destination of Goods and the Preferential Option for the Poor” within the body of the text:

The principle of the universal destination of goods requires that the poor, the marginalized[,] and in all cases those whose living conditions interfere with their proper growth should be the focus of particular concern.<sup>210</sup> To this end, the preferential option for the poor should be affirmed in all its force.<sup>211</sup>

During the course of his lengthy pontificate, John Paul II moved incrementally to affirm the Church's “preferential option for the poor.”<sup>212</sup> He divined a line of continuity within recent Church tradition by plumbing this option, hailing it as “a special form of primacy in the exercise of Christian charity [today]”<sup>213</sup> and emphasizing that “the option for the poor is a Christian option”<sup>214</sup> required by any society with concern for the common good. In embracing the “preferential option for the poor,” John Paul II would declare: “I identify with it.’ . . . It is the ‘option’ of always that [John Paul] decide[d] to embody in the today of history; in an evangelical, missionary, pastoral way.” He stressed that “the Church intends to maintain its preferential option for the poor and encourages the engagement of those who, faithful to the directives of the hierarchy, devote themselves

<sup>209</sup> RATZINGER, *supra* note 71, at 42.

<sup>210</sup> John Paul II, Address to the Third General Conference of Latin American Bishops (Jan. 29, 1979), in 71 ACTA APOSTOLICAE SEDIS 187, 194–95 (1979).

<sup>211</sup> PONTIFICAL COUNCIL FOR JUSTICE AND PEACE, COMPENDIUM OF THE SOCIAL DOCTRINE OF THE CHURCH 102 (2004). Pope John Paul II explicitly reaffirmed his commitment to the “preferential option for the poor” in his later Apostolic Exhortation, “The Church in Africa and its Evangelizing Mission Towards the Year 2000” (Vatican City: Libreria Editrice Vaticana, 1995), no. 44, expanding upon the more restrictive terminology included in *SOLLICITUDO REI SOCIALIS*, nos. 42-43.

<sup>212</sup> Cf. L'OSSERVATORE ROMANO, Jan. 21, 1985, at 9 (quoting Pope John Paul II as identifying with the “preferential option for the poor”).

<sup>213</sup> *CENTESIMUS ANNUS*, *supra* note 13, ¶ 11.

<sup>214</sup> Address to the Workers of Brazil at Morumbi Stadium, *supra* note 61, at 891.

selflessly to those most in need. That is an integral part of their mission."<sup>215</sup>

Perhaps Pope John Paul's most forceful and unambiguous affirmation of the "preferential option for the poor" occurred in a 1986 address:

Today this option is discussed above all in Latin America. But it is also discussed with regard to the Universal Church . . . [.]discussed and reaffirmed in a new context. The option for the poor is the choice of the Gospel: it is the option of Christ and for Christ. His own choice was exactly that: an option for the poor. And the option for the poor is at the same time an option for Christ, in whatever century, in whatever situation, in whatever country it is made. This we know well.<sup>216</sup>

"John Paul the Great's" legacy was ensured and enhanced more deeply by his acceptance of the "preferential option for the poor," which he ultimately viewed as not only timely and useful, but also as an essential instrument of the "New Evangelization."<sup>217</sup> As he stated clearly and unequivocally in his *Apostolic Exhortation* on the role of bishops, *Pastores Gregis*,<sup>218</sup> "the Church and the Churches must practice that 'preferential option for the poor,' which I have indicated as programmatic for the third millennium."<sup>219</sup> In John Paul II's Christian anthropology, "[t]his is what is demanded by the present moment and above all by the very dignity of the human person, the

<sup>215</sup> Address to the Peruvian Bishops on Their *Ad Limina* Visit to Rome, *supra* note 121.

<sup>216</sup> Address to the *Comunitadi S. Egidio*, *supra* note 125.

<sup>217</sup> See Letter from John Paul II to Brazilian Episcopal Conference (Apr. 9, 1986), in *LIBERATION THEOLOGY*, *supra* note 51, at 504. Pope John Paul insinuated the same in his APOSTOLIC LETTER *NOVO MILLENNIO INEUNTE* (2001), ¶ 40, in 84 *ACTA APOSTOLICAE SEDIS* 657, 781 (1992).

<sup>218</sup> JOHN PAUL II, APOSTOLIC EXHORTATION *PASTORES GREGIS* (Oct. 16, 2003).

<sup>219</sup> *Id.* ¶ 20. Curiously, the *Directory for the Pastoral Ministry of Bishops* promulgated by the Congregation for Bishops, known also by its Latin title, *APOSTOLORUM SUCCESSORES*, avoided the term "preferential option for the poor" and elects instead to use the older term, "preferential love." CONGREGATION FOR BISHOPS, *DIRECTORY FOR THE PASTORAL MINISTRY OF BISHOPS* (Vatican City State: Libreria Editrice Vaticana, 2004). The English text demonstrates that Pope John Paul II's preference for the use of term "preferential option for the poor" in his mature pontificate was skipped in this and certain other later official Vatican documents during the final years of Pope John Paul's papacy. See *id.* at 212 n.603, 232–33. See also, for example, the later abridged companion volume to the *CATECHISM OF THE CATHOLIC CHURCH*, published as the *COMPENDIUM/CATECHISM OF THE CATHOLIC CHURCH* (Vatican City State: Libreria Editrice Vaticana, 2006), that dropped the term "preferential option for the poor" entirely.

indestructible image of God . . . .”<sup>220</sup> For John Paul II, this teaching required promulgation on a universal scale, guided and inspired by the words “[t]he truth will make you free (JN 8:32).”<sup>221</sup>

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<sup>220</sup> *SOLLICITUDO REI SOCIALIS*, *supra* note 13, ¶ 47.

<sup>221</sup> John Paul II, Instruction on Christian Freedom and Liberation: The Truth Makes Us Free (Mar. 22, 1986) (internal quotation marks omitted).