Immoral Economies: Liberation Theology as Ethical Criticism

by
Katherine Stevick

Submitted in partial fulfillment of the requirement for Major Honors in Political Science

Houghton College, Houghton, New York
December 2018

Honors Committee

Chair Name: Dr. Peter Meilaender Signature: ________________________

Professor Name: Dr. Ron Oakerson Signature: ________________________

Professor Name: Dr. Richard Eckley Signature: ________________________

Contents

Introduction 1

Chapter 1: Liberation Theology in Context 4

Chapter 2: Central Concepts and Controversies 31

Chapter 3: Evolution and Challenges 59

Chapter 4: Criticism and Vision 84

Conclusion 108

INTRODUCTION

In the late 1960s, against the backdrop of political tensions, ongoing poverty, economic problems and a Catholic Church struggling to reorient itself to the challenges and directives of Vatican II, a new and radical strand of theology emerged in Latin America. Liberation theology—named after the title of a lecture by Gustavo Gutiérrez—attracted international attention for its commitment to the poor and oppressed, its innovative rereading of scripture and tradition, and especially for its unheard-of blend of Christianity and Marxism and forthright commitment to socialism. It attracted strong pushback from parts of the institutional Church and found itself in sometimes deadly conflict with Latin America's military regimes. Books were written, lectures given, the United States government and theological conservatives were both deeply alarmed, and twice the Vatican issued statements addressing the upstart theology.

And then, quite suddenly, the ruckus over liberation theology died down. The Berlin Wall fell, the Soviet Union collapsed, and with it, seemingly, died the promise of a liberating socialism and the possibility of credible Marxist social analysis. At the same time, Latin America began—slowly and in fits and starts—to experience the long-promised economic growth. Only fifty years have passed since liberation theology was born, and yet already some are wondering if its best days are behind it. Liberation theology, they charge, is no longer relevant, tied to a discredited model of social scientific analysis and a much-reviled political ideology.

Both opponents and advocates of the movement have drawn this conclusion. Joseph Ratzinger (Petrella 2006, 14), who as prefect for the Congregation of the Doctrine of the Faith vigorously opposed the theology, famously remarked, “The fall of the European governmental systems based on Marxism turned out to be a kind of twilight of the gods for that theology.” Alistair Kee (2001, 31), an admirer, worries that liberation theology has grown stale, fallen into an “old and inflexible analysis.” Ivan Petrella (2006, vii) writes that liberation theology has abdicated its “intellectual ambition and social responsibility” by letting go of its commitment to “historical projects”—systematic and institution-focused strategies for liberation—which used to play a central role in the movement. The verdict, according to these commentators, is grim.

In practice, however, the question of liberation theology’s continued relevance is more complex. The circumstances which gave birth to liberation theology—the situation of a poor, Catholic and politically volatile Latin America, vulnerable to control and even exploitation by the developed world—still exist today. The same Catholic faith is confronted with the same distressing material reality, and so liberation theology’s response remains in essence the same. At the same time, liberation theology has undeniably evolved in response to criticism and to the changing discourse in the sociopolitical and economic world. Its expression as a movement has been refined and rearticulated. Some, like Petrella worry that these shifts have undermined the core of liberation theology and emptied its message of meaning. The question becomes then in part a matter of interpretation: What are the core features of liberation theology, and have those core features survived the collapse of global socialism? It is also a question of judgement: Does liberation theology have anything to add to our discussions of justice

and poverty in the 21st century? Can it point us toward a genuine option for the poor and oppressed?

This paper argues that the two main features of liberation theology are its ethical-religious commitments and its ongoing responsiveness to the Latin American poor. I begin, in Chapter 1, with an extended discussion of the birth and growth of liberation theology, firmly situated in the political and economic situation of Latin America and its people. Chapter 2 covers the central ideas and teachings of liberation theology, as well as common criticisms of the theology. This is important background for understanding the movement, but it should also begin to clarify liberation theology's approach to the socio-political world and the seriousness of its theological reflection. Chapter 3 dives into the evolution of liberation theology and Petrella's critique of contemporary liberation theology. His analysis is useful, but I will argue that his critique misses the point by treating liberation theology primarily as a movement for social change. Chapter 4 presents my own interpretation of liberation theology as ethical criticism, develops the implications of liberation theology's commitment to the poor, and suggests that liberation theology provides ethical criteria for judging existing societies.

CHAPTER 1: A BRIEF HISTORY OF LIBERATION THEOLOGY

Liberation theology is, and intends to be, a historically situated theology, with deep roots in the Latin American experience. It was "born and bred in Latin America" (Boff and Boff 1986, 37); it is "the language of a particular, concrete Church involved with the poor and committed to their liberation;" and it finds its antecedents in "the historical Church, in the context of an oppressed, Christian, Latin American people" (Boff and Boff 1986, 20). Because liberation theology conceives of itself as "faith reflecting on practice" (Boff and Boff 1987, 4-6; Gutiérrez 1988, 5-9), intimately engaged with its historical context, I want to begin by tracing the history of the theology of liberation in Latin America. In the following chapter, I will offer a more detailed definition of liberation theology and a fuller explanation of its key concepts and teachings. For now, however, I will borrow Christian Smith's (1991, 25) broad-strokes definition: "liberation theology is simply a coherent set of religious ideas, about and for liberation." What follows is the history of the religious movement that created that set of ideas.

The Birth of Liberation Theology

The history of liberation theology begins not with Gustavo Gutiérrez, its "father," nor with the famous episcopal conference at Medellín, in Colombia, but rather in the general circumstances of Latin America after World War I. Politically, the region had experienced much earlier independence than many former colonial holdings, and it had, by the early twentieth century, a long history of nascent democracy (Reid 2017, 27-28). These democracies often suffered from limited participation and a relatively small, powerful electoral franchise; at the same time, this history of constitutionalism deserves

recognition. The level of democratic participation was comparable to that of many European states during the same period. In many ways, this history of early—albeit flawed—democracy could be seen as a regional advantage.

Beginning around 1930, and accelerating after World War II as part of the Latin American version of the Pax Americana, Latin American nations turned economically to *desarrollo para adentro,* or inward looking development (Reid 2017, 26). Also called Import Substituting Industrialization, this economic policy shifted the emphasis away from commodity exports, and towards internal industrialization and domestic enterprise, shielded by the state. Under ISI, the state played an active role in pursuing development, promoting high tariffs to protect fledgling industries, and an overvalued currency, which made purchasing production capital possible. It also provided much of the necessary infrastructure in the form of roads and central banks, while nationalizing certain key industries and keeping labor costs down by strong price controls on necessities like food and fuel. This was, Tom Chodor (2015, 66) argues, a Latin American variant of the classic Keynesian compromise between state, capital and labor. It was embedded in a political culture of resurging populism—in the sense of a drive to incorporate the "popular" classes, not just the landed elites, into society—and recurrent Latin American nationalism.

For a while, ISI performed quite well as a model of state-driven, nationalist development. The ISI system varied across the region, in terms of the thoroughness and successfulness of its implementation, but on the whole it produced significant economic growth. By 1960, all Latin American countries but Haiti were classified as middle income by the World Bank (Chodor 2015, 69). Regional GDP grew at a rate of 5.3

percent annually between 1945 and 1973, while the manufacturing sector grew at 6 percent per year (Chodor 2015, 69). This reduced poverty and hunger across the region, with an increase in education and the other benefits of development.

At the same time, the religious paradigm in Latin America was centered around the Catholic Church, specifically a mixture of the New Christendom model and Christian Democracy politics. This New Christendom model, dating from the early 20th century and reaching its peak in the 1960's, was "a strategy to establish Catholicism as a major institutional and cultural influence in Latin America's modernizing society" (Lernoux 1979, 7). It was an attempt to re-establish Catholic dominance in a region increasingly split among secular, animist and Protestant world views, and increasingly influenced by populist and left-leaning politics. The church made a valiant effort to shake off its "conservative, anti-liberal alliances" and to place itself on the side of progress and development (Lernoux 1979, 7). It became involved in European-style Catholic Action and encouraged Christian Democrats, lay Catholics who ran for public office. This program of Christian Democracy was thought of as "a 'third way' between capitalism and communism'" and as a "centrist movement influenced by the social teachings of the church" (Lernoux 1979, 7). For a while it succeeded, investing in society, invigorating the church and seeing several Christian Democratic candidates rise to high ranks (most notably, Eduardo Frei became the president of Chile in 1964) (Smith 1991, 15). As had been the case throughout much of Latin America's history, church and state remained firmly enmeshed.

All three of these elements—government, economy and religion—had massive impacts on the lives of ordinary Latin Americans, tended toward some form of third-way-

ism, and were interlocked by the late 1950's and early 1960's. All were committed to more or less the same status quo. By the 1960's, however, there were a growing series of challenges to that status quo.

The cracks in the economic system are perhaps the most important, and they arguably accelerated change in other areas. All was not perfect under ISI. There were long-running conflicts between powerful landed elites—now somewhat marginalized by industrialization—and the working and political classes. There was also a desperate need for agrarian reform, as four-fifths of agricultural land remained in the hands of this old landed aristocracy. Latin America faced massive migration of peasants to the cities, where insufficient jobs and insufficient industry left many of them in desperate poverty. Labor—the old underclass—now became something of a new elite, while the new underclass moved to the informal economy, where they had little protection and little bargaining power. The rampant inequality that had always posed a threat to Latin American stability now emerged as serious stressor on the political and economic system (Chodor 2015, 70-71).

Likewise, in the face of ongoing economic inequality, Latin America witnessed increasing political polarization. On the one hand, there was, in some countries, a resurgence of Marxist and more generally socialist and left-leaning political parties. Beginning in the mid-sixties, this shift culminated in the rise of Salvador Allende's socialist regime in Chile and the rise of Marxist guerilla movements in Uruguay and Colombia in the early 1970s (Chodor 2015, 70-71). While the ISI economies were certainly not bastions of free-market capitalism, they had been capitalist, in a sense. This revolutionary leftist resurgence was in many ways a classic expression of frustration and

felt exclusion on the part of the working classes. On the other hand, it was also during the mid-sixties that the first of many repressive military regimes came to Latin America, with the rise of military governments in Argentina and Brazil (Lernoux 1979, 9). It would be these military regimes—the Pinochets of Latin America, not the Allendes—who would dominate the coming decades.

Tellingly, the New Christendom model of the church's relationship to the world also began to crumble in the early to mid- 1960's, in part due to the inability of Christian Democratic regimes to deliver on their promises of reform, and in part due to Vatican II's new vision for the church in the world. This vision emphasized the "more humble 'pilgrim' status of the Church, journeying alongside the rest of humankind," while the New Christendom model had been based on the assumption that the church should "'christianize' and control society" (Smith 1991, 17). It was a paradigm shift that would undermine the New Christendom and Christian Democracy movements, opening the door for liberation theology.

As the New Christendom movement began to lose ground, important voices in the Church hierarchy began to criticize the existing systems of church and state and demand drastic change. The prime example is Dom Hélder Camera, a Brazilian bishop from Rio de Janeiro and an important figure at the Medellín conference (Lernoux 1979, 11). Camera had been closely involved with Catholic Action since 1947 and was instrumental in the creation of the Latin American Bishops' Conference (*Consejo Episcopal Latinoamericano* or CELAM) in 1955. He criticized the capitalist economic system, "called for the conscientization, or 'consciousness-raising' of the poor, and raised the possibility of a move towards socialism," all ideas which would become typical of the

liberationists (Smith 19917, 15-16). Camera was the driving force behind the "Message to the People of the Third World," a post-Vatican II document signed by fifteen bishops from Latin America, Africa and Asia. This letter criticized existing systems of inequality, using the language of the proletariat and oppression, of gospel revolution and of socialism as "Christianity integrally lived," that is, Christianity absorbed into the totality of human life, temporal and spiritual (Smith 1991, 16). Many of these themes would be picked up by liberation theologians in the decades to come.

In 1968, in the face of growing political unrest, a resurging Marxist presence, and the damning and pervasive poverty of many Latin Americans, Peruvian priest Gustavo Gutiérrez delivered a lecture in Lima, Peru, which used for the first time the phrase "a theology of liberation" (Gutiérrez 1988, 175). This lecture would be expanded and delivered several times over the course of the following months. Gutiérrez had joined Camera and a growing body of radical critique.

A few months after Gutiérrez' first lecture, the Latin American Episcopal Conference would call its second plenary session in Medellín, Colombia. This 1968 conference is traditionally regarded as the "official birth" of liberation theology (Sayer 2015, x), though it was really the natural culmination of an ongoing discontent and an increasingly radical approach to confronting Latin America's social problems (Smith 1991, 14-15). With Medellín, ideas like those of Gutiérrez and Camera burst into the Latin American Catholic mainstream. The CELAM conference at Medellín was intended to apply the ideas of Vatican II to the specifics of the Latin American situation; the title of the meeting was "The Church in the Present-Day: Transformation of Latin America in the Light of the Council," the Council of course being the Second Vatican Council

(Smith 1991, 18). It did this, certainly, orienting the church towards local pastoral communities and the importance of the people of God alongside the institutional church, but it also served to bring a critical consciousness of poverty and a deep concern about the effects of capitalism into the Latin American Catholic mainstream.

The official purpose of the conference was to craft a distinctively Latin American response to the Council. Its outcome was "to throw the weight of the Roman Catholic Church's authority into controversial programs for social change" (Smith 1991, 18). These programs included the ecclesial base communities (CEB's), workers' movements and educational and catechetical programs designed to frame the situation of the poor in terms of justice and revolution (Boff and Boff, 1987). Despite its controversial nature, the document was signed by the majority of bishops in attendance and therefore represented the official stance of the Church in Latin America (Smith 1991, 19). It was, to the dismay of conservatives, meant to be "the norm for inspiration and action in the coming years"—the Church's plan for Latin America (Smith 1991, 19). The repercussions of Medellín launched a heated back-and-forth between radicals and reactionaries that would not begin to settle until the CELAM conference at Puebla and John Paul II's visit to Mexico, ten years later.

Medellín arguably revitalized the Church in Latin America, giving birth to "a movement that draws out of the gospel not only the imperative to help the poor but also to transform the directions of society in concrete ways" (Sayer 2015, x). Though mild in comparison to much of the theology that would develop out of Medellín, the conference documents still represented a radical repositioning of a Church that had, historically, tended to side with conservative power elites (Smith 1991, 18-19). This surprising—and

to many, deeply welcome—shift was due to what Jesuit liberation theologian Jon Sobrino calls “a happy convergence” of events (Sobrino 1979, 289). These events included the growing awareness of the drastic poverty and inequality in Latin America, the church’s vigorous response to that awareness, and “the concrete Latin American implementation of Vatican II,” this last being, of course, the official business of the conference (Sobrino 1979, 289).

The bishops attending the conference were persuaded to endorse this new orientation in part by hard evidence of the failure of the developmentalist model and the growing poverty of the Latin American people. Lernoux recounts Brazil’s Bishop Padim’s reaction to the meeting:

> Only when we had assembled at Medellín and spent a week in discussions, with slide presentations illustrating the statistics of poverty, did we begin to have a global vision. For many of those attending…it was an eye-opening experience as well as a cause for fright, because the situation was much worse than they had suspected. So the delegates were prepared to make a commitment. (Lernoux 1979, 11)

This language of commitment—*compromiso*—runs throughout the Medellín document and indicates the Church’s willingness to live with and work for the poor in Latin America. The church was preparing, in the words of Pope John XXIII, to become “preeminently the Church of the poor” (Sayer 2015, xiii).

The Medellín document itself is composed of sixteen sections, of which only a few—as Lernoux points out—are at all revolutionary. This does not mean, however, that the document expressed the Church’s commitment to the poor and its horror at the current Latin American situation with any ambiguity. The opening to the section on “The Poverty of the Church” reads:

1. The Latin American bishops cannot remain indifferent in the face of the tremendous social injustices existent in Latin America, which keep the majority of our peoples in dismal poverty, which in many cases becomes inhuman wretchedness.

2. A deafening cry pours from the throats of millions of men, asking their pastors for a liberation that reaches them from nowhere else. "Now you are listening to us in silence, but we hear the shout which arises from your suffering," the Pope told the 'campesinos' in Columbia. (*Medellín: Poverty and Church*, 1)

The Church had come down firmly—to use Gutiérrez's famous phrase—on the side of the poor. From this point on, liberation theology began to spread rapidly.

After Medellín, the next important step forward for liberation theology was the 1971 publication of Gustavo Gutiérrez's famous *A Theology of Liberation*, which is arguably the most influential work of liberation theology ever published, and the definitive exposition of its main principles. Gutiérrez begins this work with a reflection on the meanings of the terms "theology" and "liberation," in an attempt to make clear and definite what it is he has to discuss. He moves on to one of the critical questions of liberation theology: "what relation is there between salvation and the historical process of liberation?" (Gutiérrez 1988, 29). *A Theology of Liberation* was, as Smith says, "groundbreaking" and it was immediately followed by "a wave of works on liberation theology" published by other authors (Smith 1991, 21). If liberation theology was born at Medellín, the publication of *A Theology of Liberation* was the moment when it took off.

Controversy and Opposition

Liberation theology, however, faced an uphill battle. It is perhaps not surprising that Medellín and the publication of *A Theology of Liberation* both took place during the brief leftwing resurgence of the late sixties and early seventies. In the years that followed, the political climate, both within the church and in Latin American states, became

increasingly hostile toward progressive ideas of both a political and a theological nature. Liberation theology blended the two, and attracted criticism on both counts.

The political situation in Latin America continued to deteriorate, as civilian governments crumbled and were replaced by the military. Allende's Chile became Pinochet's Chile in 1973 (Petrella 2006, 11), and by the mid 1970's only Venezuela, Colombia and Costa Rica remained under civilian control (Chodor 2015, 70-71). The 1969 Rockefeller report, noting this trend in its infancy sees it as both a great opportunity and a serious threat, remarking that "authoritarian governments…have an intrinsic ideological unreliability and vulnerability to extreme nationalism" (33) and are therefore a potential threat to regional stability, though Rockefeller was hopeful that they would play a useful transitional role. Instead, these military regimes promised to purge their societies of socialism and populism, and did so with violent efficiency (Chodor 2015, 70-71.

The military regimes often treated the church—especially the progressive, left-leaning church and the unrepentantly socialist liberation theologians—as a threat to their power, and they proceeded accordingly. This was a period of intense persecution for the Church—even for "moderate churchmen"—by the authoritarian regimes taking root across the region (Smith 1991, 16). The "harassment, arrest, torture, expulsion, even death" of hundreds of priests and thousands of lay people were the cost of the growing conflict between Rockefeller's "unreliable" military regimes and a Church that increasingly opposed arbitrary power and human rights violations (Lernoux 1979, 16-18). This period was, in the eyes of those sympathetic to the cause of liberation theology, an age of martyrs: Óscar Romero, Hector Gallego, Rutilio Grande, and many others.

At the same time, liberation theology began to attract the attention of the outside world, prompting a growing critique from within the Church and causing some alarm in the United States. Part of the critique was related to liberation theology's rather ambiguous relationship with violence and with unflinchingly partisan political movements. For example, it was often connected with Camillo Torrez, a folk hero and martyr to some, and a disgrace to the priesthood to others. Torres was a Colombian priest whose increasingly radical political stance set him at odds with his superiors; after a few months of intensifying conflict in 1965, he renounced his priesthood, defected to the guerrillas, and was promptly killed in an ambush. Torres insisted, "The Catholic who is not a revolutionary is living in mortal sin," and he believed that "armed struggle is the only means that remains" for solving the continent's social problems (Smith 1991, 16). His actions shocked many devout Catholics, even liberation theologians, and earned him the disapproval of his friend, Gustavo Gutiérrez (Smith 1991, 16). Even so, Torres is sometimes counted among the forerunners of liberation theology, and the presence of violent, politically radical Christians in Latin America made it difficult for liberation theology to present itself as a credible voice for change.

Liberation theology was also, perhaps unfairly, closely connected with related movements like Christians for Socialism, a radical group led by priests like Gonzalo Arroyo in Chile, which identified explicitly with the Marxist-Socialist goals of Allende's government (Lernoux 1979, 13). Whether or not Christians for Socialism, and particularly Hugo Assman, a leader in the movement, can be legitimately included in the genealogy of liberation theology is somewhat open to debate (Petrella 2006, 73-75; Lernoux 1979, 13). Christians for Socialism was, however, undoubtedly "a minority

group" which supported "class struggle and a 'praxis of revolution'" ostensibly based on the conclusions of Medellín, though as Lernoux (1979, 13) rightly points out, the conference's final document "could in no way be described as a platform for revolution." Movements like Christians for Socialism, though criticized by liberation theologians as displaying "an excessive enthusiasm with little critical analysis" and an "absence of serious political reflection" (Lernoux 1979, 13), were often identified with liberation theology itself.

There is, undeniably, a certain amount of kinship. These movements, though they lacked liberation theology's subtlety of reflection and its partial integration into Catholic Social Teaching, do share some of the same concerns with what I consider "true" (Gutiérrez, Romero, the Boff brothers) liberation theology. Lernoux writes:

> Thanks to their vociferous defiance of the hierarchy and their radical positions, these groups attracted considerable press coverage, confirming the fears of those Bishops who had earlier viewed Medellín as a Pandora's Box for Marxist revolution. Yet the critics ignored both the Church's history of involvement with partisan politics as well as reality itself: very few Latin American clergy or religious ever accepted Christians for Socialism's revolutionary interpretation of Medellín, or a partisan commitment to political movments. (Lernoux 1979, 13)

Unlike liberation theology, however, Christians for Socialism identified fully and explicitly with a Marxist political program, instead of simply borrowing parts of Marxist social analysis. After a visit from Fidel Castro in 1971, the Chilean priests were "dazzled" and completely won over to the idea of socialist revolution (Fernandez 1991, 288). The fear that Medellín and its more activist interpretations were a hotbed for Marxist revolution would become a long-running theme in criticism aimed at liberation theologians. This, combined with the idea that liberation theologians were inherently

anti-hierarchical and thus anti-church or anti-Catholic, became key parts of the Church discourse about the evils of liberation theology.

Critics of liberation theology, notably Belgian Jesuit Roger Vekemans and CELAM Secretary General Alfonso López Trujillo, tended to identify liberation theology with the more radical and much feared Christians for Socialism and to emphasize any hint of Marxist or anti-hierarchical thought in liberation theology (Lernoux 1979, 21). Vekemans in particular "seized on the work of the most radical liberation theologians, such as Brazil's Hugo Assmann, and the ferment in Chile"—that is, the conflict between Christians for Socialism and the nascent Pinochet regime—"to equate liberation theology with Christians for Socialism and a 'theology of violence'" (Lernoux 1979, 14). This strategy has shaped the discourse surrounding liberation theology's legitimacy up to the present day.

It was during this decade between Medellín and the conference at Puebla that liberation theology came under fire from conservative elements in Latin America, and then from the wider Church, especially from conservative bishops and theologians in Germany. Many of the bishops who had cheerfully signed the Medellín conclusions began to have second thoughts, feeling that they might have acted otherwise if they had understood the full impact of Medellín (Lernoux 1979, 12). Alarm sparked by Christians for Socialism and others like them shifted the balance of power in CELAM back toward conservative proponents of the status quo, and in 1972 a conservative bishop from Bogotá, Alfonso López Trujillo, took over as secretary general of CELAM (Lernoux 1979, 14). He "immediately set about dismantling the CELAM departments associated with Medellín" for "budgetary reasons" (Lernoux 1979, 14) and set about replacing

liberation theologians within CELAM with those hostile to the movement (Smith 1991, 22). Meanwhile in Germany, the work started by Roger Vekemans was carried on by the Adveniat, the German bishops' aid agency for the Latin American Church, in what Lernoux calls a "German-financed smear campaign" against liberation theology (Smith, 1991, 20-21).

At the same time, the Catholic left in Latin America—which often meant, functionally, liberation theology—had attracted the attention and alarm of the United States. Liberation theology's association with more radical groups may also help explain the reaction it received from the North. America's concerns about liberation theology date from around 1969, just after Medellín, following Nelson Rockefeller's tour of Latin America and the publication of the Rockefeller Report, which I mentioned earlier in connection with the rise of militarism. That report would become the basis for much of Richard Nixon's Latin American policy (Lernoux 1979, 12). It noted that the Catholic Church and the military were "among today's forces for social and political change in the other American republics [Latin America]," which was "a new role for them," as the Church and the military had historically worked to "provide stability" in Latin America and to maintain the status quo, rather than spearheading movements for change (Rockefeller 1969, 31). The Church was, according to Rockefeller, an important force for change but also a potential danger to America and to the hemisphere. He writes that the Church is, "in some cases, vulnerable to subversive penetration; ready to undertake a revolution if necessary to end injustice, but not clear either as to the ultimate nature of the revolution itself or as to the governmental system by which the justice it seeks can be

realized," the implication being that the Church might mistakenly throw its lot in with the Marxists (Rockefeller 1969, 31).

The Rockefeller report raised two significant concerns about Latin America, at least in the minds of interpreters of the report like the *New York Times'* Tad Szulc, who contributed an introduction to the published version. First, there was the fear that the situation in Latin America would give rise to new communist regimes, though as Lernoux points out, "only one Communist country, Cuba, existed in the hemisphere, in contrast to eleven nations with right-wing totalitarian regimes," implying that fascism may have been the more imminent threat to regional stability (Lernoux 1979, 21). The second fear was directed at the role of the Catholic left in creating hostility toward American action in the region. Szulc wirtes:

> The Church…now increasingly favors reforms. But, as recent pronouncements by Latin American churchmen have shown, the young clergy, the "worker priests," and politically active leftists Catholics are blaming the U.S. for much that is wrong with life in Latin America. A section of the Church is, then, becoming an additional channel for intensive nationalism and, axiomatically, for anti-Americanism. (Rockefeller 1969, viii)

The hostility of the Catholic left was, perhaps, more merited than Szulc could have understood in 1969. In the decades since the publication of the Rockefeller report, US meddling in Latin American affairs, including violent counterinsurgency tactics and support of frankly oppressive regimes favorable to its interests, has been amply documented, and the point need not be reiterated here. The United States' role in the creation of the Banzer Plan, however, is immediately relevant to our discussion of liberation theology. Named after Hugo Banzer, then dictator of Bolivia, the plan was created in 1975 with the help of the CIA. Its goal was to target progressive bishops and to "harass and expel foreign priests and nuns" (Lernoux 1979, 17). In short, the United

States contributed to the persecution of liberation theologians and other left-leaning Catholics by Latin America's military governments, joining an opposition camp spanning from German bishops and conservative Latin Americans to military governments, pro-market political parties, and political elites.

Puebla and Its Aftermath

The tensions surrounding liberation theology continued to rise through the 1970s but were not dealt with head on until 1979, with the CELAM's third plenary session. The conference at Puebla was, to conservatives, their best opportunity to undo the shift in Church priorities created by Medellín. To the liberationists, it was their last best hope to win recognition and legitimacy for the theological activities that they believed to be absolutely critical to their faith (Smith 1991, 23). Pope John Paul II himself visited Mexico for the occasion, an unprecedented step indicating the importance of the conference (Vecsey 1979). Even the secular US watched with fascination, as demonstrated by George Vecsey's January 28, 1979, article for the New York Times. "The Pope did not have to attend," commented Vecsey, but since he did, "his actions will be watched carefully for signs of commitment one way or another on what is called 'liberation theology,'" as people on both sides of the issue hoped to receive pontifical support.

The chances of liberation theology receiving anything like an official church affirmation appeared slim. The presence of the Pope, while honoring the importance of the issues being discussed at Puebla, could seem like a threat to the success of liberation theology. Liberation theologians might well be nervous that the Pope, who had "given many indications of theological conservatism," might at the conference display a

similar—and to liberation theology, deadly—conservatism on political issues (Vecsey 1979). Perhaps more importantly, CELAM was at that point controlled by conservatives deeply distrustful of the theology of liberation, worker priests and CEB's. Cardinal Lopez Trujillo successfully excluded the vast majority of bishops and clergy favorable to the theology of liberation from the guest list for Puebla (Lernoux 1979, 24) and even prevented theologians like Gutiérrez from serving as advisors— "staff aides"—to the bishops in attendance (Vecsey 1979). In addition to the exclusion of liberation theologians from the conference, Trujillo placed conservative bishops in strategic positions to control the committees, and chose conservative—that is, anti-liberationist—staff members to prepare the key documents (Smith 1991, 23).

What López Trujillo and others like him could not control, however, was the changing social and economic situation in Latin America. Since Medellín, the situation in the region had become more desperate. More people had sunk into poverty, more were starving, more countries were drowning in debt, and violence had erupted across the region with the rise of military dictatorships and the national security state (Lernoux 1979, 25). Since 1964, Bolivia, Peru, Chile, Uruguay, Ecuador and Argentina had experienced military coups that left them with authoritarian regimes—regimes that were, as noted above, more than happy to attack the Church when its behavior was deemed subversive (Smith 1991, 22). Despite the fact that economic growth held relatively steady through this period, the perception on the ground was that mass poverty had increased dramatically—a divergence that might be explained by the unequal distribution of the proceeds of economic growth. It is also worth noting that many Latin American countries were already entering recession in 1979, before the debt crisis of 1982 (de Janvry and

Sadoulet 2000, 274). Despite some ambiguity in the economic data, however, the Church at the time clearly felt that it was witnessing a dramatic regress. In the words of the Theological Commission of Northeastern Brazil, “If the Church were to summarize the past decades of ‘development’ in Latin America, it would have to state that the result is more hunger” (Lernoux 1979, 25). Hunger and brutal repression had left even conservative elements of CELAM with a growing distrust of developmentalism and Church-state alliances, and with an increasingly activist stance on social issues.

This situation of increasing poverty did not at first slow the assault on liberation theology. López Trujillo’s original working document, a massive tome known as “the green book,” favored a traditional understanding of the Latin American situation, a Catholic-society status quo, and the now-familiar third way between Marxist and capitalist extremes: in short, the failed Christian Democracy or “New Christendom” model (Lernoux 1979, 23). Oddly enough, the document made no mention of the growing economic desperation in the region, the repression by military dictatorships, or the persecution of the Church. Instead, it “rejected Medellín’s commitment to the poor and oppressed in favor of doctrinal orthodoxy and political accommodation, albeit critical, of existing power structures” (Lernoux 1979, 23). This conservatism was an affirmation that, in the words of Jon Sobrino (1979, 291), “The surprising tack of Medellín had proved too much for some,” with a tacit admission that “the proclamation of the good news to the poor had proved to be too dangerous,” inviting seeming capitulation to Marxism on the one hand and oppression by the government on the other.

The bishops of the conference took a hard look at the plight of their people and the unhelpful, even reactionary “Green book” and they roundly rejected the proposed

document (Vecsey 1979). Following this rejection, Brazil's Cardinal Aloisio Lorscheider, then President of CELAM, led a group of bishops in Bogotá in creating a more concise, moderate rewrite of the document (Lernoux 1979, 24). This draft, which would eventually become the final document, took a more activist approach to the realities of Latin America in the late 1970's, denouncing the cruelty of "regimes based on force" (CELAM 1979, 129) and the "situation of pervasive extreme poverty" (CELAM 1979, 128). The bishops agreed that their world had only worsened since Medellín, writing:

> From the depths of the countries that make up Latin America a cry is rising to heaven, growing louder and more alarming all the time. It is the cry of a suffering people who demand justice, freedom, and respect for the basic rights of human beings and peoples. A little more than ten years ago, the Medellín conference noted this fact…the cry may have seemed muted back then. Today it is loud and clear, increasing in volume and intensity, and at times full of menace. (CELAM 1979, 34)[1]

In light of this cry for help and the deteriorating social and economic world of Latin America, the bishops were again willing to make a commitment, to reaffirm Medellín, and to accept certain liberationist ideas that were suited to the demands of the moment.

Despite the strength of Puebla's language on these issues, Smith calls the final document "ambiguous" and "not a resounding victory" for liberation theology. He points out that the document "was not one that liberation theologians would have written" and bears the marks of the Trujillo camp (24). Despite the scarcity of liberation theologians at the conference, however, the final document does embrace many liberationist concepts, including "the necessity of 'integral liberation,' the use of BEC's [CEB's] as a pastoral strategy and 'the preferential option for the poor'" (Smith 1991, 24). This last is, in the eyes of Gutiérrez, the very heart and soul of liberation theology (Gutiérrez and Müller

[1] Articles 87-89.

2015, 42). Jon Sobrino, SJ, (1979, 309) writes that "Puebla represents an opportunity to settle and solidify what was said at the Medellín Conference, and to truly implement it," that is, to allow the spirit of Medellín to permeate the whole of church action in Latin America. While not as progressive as some liberationists may have hoped, the new Puebla draft reiterated Medellín's commitment to the poor, its language of social sin, and its criticism of current capitalistic practices (1979, 134).

Nonetheless, the battle over liberation theology was not over. In the eyes of the US government, it remained a threat to regional stability. The 1980 document prepared for Ronald Regan by the Committee of Santa Fe "called upon the U.S. government to act offensively against the theology of liberation and the Catholic Church of Latin America influenced by this theology," claiming that "the Marxist-Leninist powers have used the Church as a political weapon" (Gutiérrez and Müller 2015, 23). On the theological front, while liberationists continued to gain support in Latin America among bishops, priests and laypeople alike, many European and North American theologians remained hostile. Despite support from such influential theologians as Hans Urs von Balthasar, Karl Rahner and J.B. Metz (Boff and Boff 1986, 7, 38; Lernoux 1979, 22), liberation theology was often regarded as rebellious, heretical, and definitely Marxist. These three concerns—liberation theology as Marxist, anti-Magisterium and as denying the transcendence of Christ's sacrifice—can all be seen in the *Instruction on Certain Aspects of the "Theology of Liberation"* promulgated by the Congregation of the Doctrine of the Faith in 1984, under the leadership of Cardinal Joseph Ratzinger. These three concerns eventually dominated the discussion surrounding liberation theology and its legitimacy as

part of the Catholic tradition. They will be discussed in more detail in the "Controversies" section of the next chapter.

The original text of the *Instruction*—what is now its Chapter VII—was and is a stinging criticism of liberation theology, and if it had been left to stand on its own it would have been a crushing blow for both the movement and its theological reflection. Pope John Paul II, however, who was now cheerfully using liberationist concepts in his own writings and deeply committed to the same sorts of social concerns occupying the Latin American church, "found it [the proposed text] to be too purely negative and returned it to the Congregation for amplification and greater balance" (Boff and Boff 1986, 42). This included explicit instructions for sections detailing the useful aspects of liberation theology and the legitimacy of the basic project of liberation as an integral part of Christian commitment.

The *Instruction* endorses the "root" of liberation theology, writing that "in itself, the expression "theology of liberation" is a thoroughly valid term: it designates a theological reflection centered on the biblical theme of liberation and freedom, and on the urgency of its practical realization" (*Instruction* 1984, III: 4). Its tone remains cautious, however, warning of possible "deviations" and the difficulty of purifying "concepts borrowed from various currents of Marxist thought" (*Instruction* 1984, intro). Confident that the Vatican had approved their basic project, liberation theologians set about clearing up misunderstandings about how that project was being conducted, as well as refining and improving it (Boff and Boff 1986, 12; 22-23). They also demanded input into the promised follow-up document which would further establish the Church's relationship to liberation theology (Boff and Boff 1986, 45) and continued to address and protest the

accusation that liberation theology is thoroughly Marxist and therefore deadly in the long run.

Although it affirmed the legitimacy of Christian liberation in general, the *Instruction* was frequently sharply critical of Latin American liberationists. This was met with frustration and a sense that the Vatican had failed to respond to the complexities and demands of the real Latin American situation. The document's criticisms did not address liberation theology as actually practiced, in the eyes of Cardinal Daneels, a member of the Congregation, but rather "a caricature, a bad liberation theology," which had little basis in reality (Boff and Boff 1986, 12). The liberation theologians complained that the document had been produced in isolation from Latin Americans and without consulting those actively engaged in Liberation Theology: "Hence [its] peculiar outlook, one foreign to the milieu where the theology in question originated, flourishes and is being practiced" (Boff and Boff 1986, 41). Despite feeling insulted and misrepresented, however, Clodovis Boff writes that the *Instruction* "does not impugn liberation theology at its root," but rather, despite its flaws and criticisms, "provides the theology with a new and vigorous endorsement. The document actually bestows its seal of approval on the actual basis of liberation theology" (Boff and Boff 1986, 12). The liberation theologians ultimately, despite anger at how their work had been represented (or, in the eyes of the Boff brothers, misrepresented) by the *Instruction*, took it as a victory.

The economic slowdown and growing poverty which had been foremost in the minds of the bishops at Puebla had now materialized into hard facts and figures, undeniable from both an experiential and an econometric standpoint. By 1982, the year of the Latin American debt crisis, most of Latin America had entered the massive economic

contraction that would lead to the so-called "lost decade" of underdevelopment, stagnation and increased poverty and inequality. The military regimes of dying ISI had failed to address underlying social and economic problems, and instead had taken on massive amounts of debt to support growth. In August 1982, Mexico declared a unilateral moratorium on its debt payments. It was, quite simply, unable to pay. This triggered an economic crisis of a magnitude not seen since the Great Depression, as capital fled, real GDP fell by 8 percent over the next year or so, and domestic investment plummeted by $76 billion (Chodor 2015, 73). The military regimes began to crumble and their immediate successors were often left-leaning, sharing liberation theology's distrust of capitalism. The free market, writes Chodor (2015, 74), closely associated as it was with the military governments, was deemed incompatible with much-needed democratization and social justice. In this climate, the liberationist endorsements of socialism broadly understood, and condemnation of capitalism as actually practiced in Latin America, were understandably appealing.

Shortly following the publication of the first *Instruction,* Brazilian liberation theologian Leonardo Boff was summoned to speak with Cardinal Ratzinger of the Congregation of the Doctrine of the Faith, and then placed under a year-long period of enforced silence to reflect on ("think better of") ideas he had developed in his 1985 book *Church: Charism and Power* (Boff and Boff 1986, 75-91). This silencing drew attention back to the relationship between the Vatican and the liberationists. Boff's release was quickly followed by the publication of the promised second document on liberation theology, *Instruction on Christian Freedom and Liberation* in 1986. This second document, like Puebla and the first *Instruction*, could have been a thorough rejection of

the theology of liberation, but was, like the others, more of a cautious acceptance of the root principles, with a bit of hand-wringing about Marxist categories and an expressed desire that the Latin American theologians proceed with care.

Liberation theology was about to face a new challenge, however, this time not from the institutional Church, but from the changing world political climate. This was the apparent collapse of socialism—the political fix usually prescribed by liberation theologians for Latin America's development and distribution problems—with the fall of the Berlin Wall in 1989 and the mass implementation of free market reforms in Latin America from the late 1980s through the early 1990s. The fall of the Berlin wall dramatically undermined the credibility of a socialist solution in the mind of the international community as a whole, even for Latin Americans who had never looked to Soviet Russia for political inspiration. In the words of Juan Luis Segundo (1974, 1), the options were not between "un capitalismo y un socialismo ya «desarrollados»," not between socialism and capitalism as they already existed. He adds, "No se trata, para nosotros, de elegir entre la sociedad existente en los Estados Unidos y la existente en la Unión Soviética"—"It is not a question, for us, of choosing between the existing societies of the United States and the Soviet Union" (Segundo 1974, 1). Latin America was seeking its own way forward. It is undoubtedly true, however, that the fall of USSR seriously undermined the credibility of other variants of socialism.

It was thought, in the North Atlantic world, that the only serious challenge to capitalism—"real socialism" as the liberation theologians tend to call it, socialism as it has actually existed in history—had been defeated. The fall of the Berlin Wall "brought to a dramatic end an experiment of some seventy years between two alternative ways of

organizing an economy: top-down versus bottom-up; central planning and control versus private markets; more colloquially, socialism versus capitalism" (Friedman 2002, viii). Those who continued to advocate for a socialist option, or to protest free-market capitalism, were easily dismissed. Chodor (2015, 63) remarks on this functional silencing, noting that "protestors against the neoliberal world are successfully marginalised as a 'Noah's ark of flat-earth advocates, protectionist trade unions and yuppies looking for their 1960's fix,'" quoting from Milton Friedman in 1999.

The second blow to liberation theology's socialist vision came from the economic restructuring of Latin America. The governments following immediately on the heels of the military regimes may have tended to favor socialism, but ultimately they were to have little choice in the matter. With their economies crippled, they were forced to accept IMF and World Bank structural adjustment packages, or SAPs—free market reforms made law in exchange for debt restructuring and access to fresh capital. More heterodox economic solutions were quickly scuttled by the international investment community, through such tactics as declaring rebel countries ineligible for new loans. (Chodor 2015, 75) Latin American countries accepted SAPs in droves, deregulating labor, privatizing state assets, liberalizing trade, becoming more "export oriented," reducing tariffs, eliminating quotas and eliminating subsidies, wage controls and the like. Chodor (2015, 58-59) indicates that between 1978 and 1992, more than 70 countries accepted a total of 566 SAPs, with predictably liberalizing policy changes to follow.

The question, then, in light of this much vaunted death of socialism, is whether liberation theology has the resources to survive in a post-Iron Curtain world, and indeed whether it has anything left to say, or any real usefulness in contemporary society. Müller

(2015, 22) notes that the initial reaction from many observers was that it was "only a matter of time until Latin America would have to give up its opposition to and protest against centuries of exploitation," a protest which had found full expression in and indeed made up much of the content of liberation theology. He adds that there was often "a dark delight, a Schadenfreude, that the theology of liberation had apparently lost its underpinning" (Gutiérrez and Müller 2015, 23). Liberation theology, it seemed, would have to reinvent itself. Indeed, as I will argue later on, it underwent a certain transformation after 1989.

Liberation theology did not, however, simply disappear following the death of "real socialism" nor could it, while there was still a poor, Catholic and hopeful Latin America generating certain kinds of reflection. Müller remarks elsewhere that:

> Liberation theology will not die as long as there are men and women who are motivated by God's liberating action and pursue—by the measure of their faith and the drive of their social action—their solidarity with their neighbors who are suffering, their neighbors whose dignity has been tossed into the trash….liberation theology involved believing in God as a God of life…and also acting in opposition to the gods who desire the premature death, poverty, impoverishment and devaluation of human beings. (Müller and Gutiérrez 2015, 26)

Liberation theology would not die, but it might, perhaps, take other forms. The evolution of liberation theology—and the challenges posed to it by those who, like Ivan Petrella and Alaistair Kee, think that it has lost some of its defining characteristics—will be covered in Chapter 3.

For now, however, it is enough to say that liberation theology not only survived the fall of global socialism, albeit in changed form. It also succeeded in gaining partial acceptance from the wider church. Its key concept, the preferential option for the poor, has become "part of the universal magisterium of the church, as numerous texts of John

Paul II and of diverse non-Latin American episcopacies attest" (Gutiérrez and Müller 2015, 7), while support from figures like Rahner and von Balthazar lent it added credibility in Europe and America. There are, however, still those who see liberation theology as deeply opposed to all the Catholic Church stands for—those who see it as an inherently anti-hierarchical, pro-Marxist, and improperly "immanentizing" movement (Gutiérrez and Müller 2015, 22. If these concerns are correct, the longevity and relevance of liberation theology is indeed limited. These criticisms, and the controversies stemming from them, will be dealt with in full in the following chapter, which offers a fuller definition of liberation theology and its contents and methods.

CHAPTER 2: CENTRAL CONCEPTS AND CONTROVERSIES

Before turning to the question of liberation theology's ongoing relevance and the usefulness—or lack thereof—of its critique of the dominant liberal-capitalist world order, I want to give a richer explanation of the theology itself, its emphases and its teachings. It is a theology surrounded by controversies and confusions, not least because it is a practical theology evolving out of a movement, lacking a central guiding body or a single authoritative voice to declare to the rest of the world what exactly it is that liberation theology is and does. I will begin, then, with the same tentative definition advanced in the last chapter before moving on to discuss its aims and methods and its key concepts. This discussion will complicate and enrich the definition, hopefully leading to a working understanding of the heart of liberation theology.

Definition and Key Concepts

Even the term "liberation theology" can be confusing. It is used to designate both a movement—centered around local priests, the poor, "conscientization," and Base Ecclesiastical Communities—and a theory or set of theories that grow out of this lived experience. I follow Christian Smith (1991, 25) in insisting on separating these two aspects; there is an important distinction between liberation theology as theology and "the movement for which it is named," though the two are nonetheless tightly tied together. Smith claims, as I noted before, that "liberation theology is simply a coherent set of religious ideas, about and for liberation," a definition that will be refined and fleshed out through further discussion, but which sets out the project of liberation theology in very general terms (Smith 1991, 25. It is with this "coherent set of religious ideas" that I am

primarily concerned, though a full understanding of liberationist concepts requires the history of the movement sketched in the last chapter.

There is, however, a problem to address, since some might argue that liberation theology is not “a coherent set of religious ideas,” but rather a confusion of different perspectives not deserving to be treated as a unified whole. Roger Haight (1985, 15) notes this challenge, writing, “there are many liberation theologies and many authors who are not all saying the same thing.” These authors do not, in his mind, form a school or a system. This has a certain amount of truth to it; liberation theology is constantly evolving, and its different proponents may choose different aspects to “accent” (Boff and Boff 1984, 24-30). Liberation theologians themselves, however, regard what they are doing as an internally consistent project and recognize each other as companions on the same journey. Leonardo and Clodovis Boff insist that “one basic inspiration” runs through the many variations of liberation theology. That inspiration is based on:

> …a faith that transforms history, or, as others would put it, history seen from the basis or ferment of faith. This means that the liberation theology of a Gustavo Gutiérrez is substantially the same as the liberation theology of a Christian laborer in northeastern Brazil. The basic content is the same. (Boff and Boff 1987, 14)

Liberation theology, then, is not a meaningless category, but something identifiable despite its variety of forms (Boff and Boff 1987, 14; Gutiérrez and Müller 2015, 57). Liberation theologians, despite differences of nationality and education, are driven by the same concerns and come to similar conclusions. Continuing in this vein, the Boffs write:

> A purely academic and didactic interest will discern various accents within the one, single theology of liberation. I must insist that there is one, and only one, theology of liberation. There is only one point of departure—a reality of social misery—and one goal—the liberation of the oppressed…a variety of tendencies can be discerned—which does not, however, constitute alternative liberation theologies. (Boff and Boff 1984, 24).

There are, as the Boffs suggest, central concepts and concerns shared by the majority of liberation theologians, on the basis of which a coherent theory can be constructed.

The fact that Latin American liberation theology is, as I will argue, a consistently and self-consciously Catholic movement (with a few Protestant exceptions) also has implications for our ability to treat it as a coherent whole, at least at this late stage. Liberation theology was developed in dialogue with tradition and with the Vatican, a process which has helped refine it, as liberation theologians responded carefully to criticisms leveled by the Vatican and sought to clarify their language in light of them. As Gutiérrez writes in his 1988 new edition of the *Theology of Liberation,* "In the years since Medellín"—the conference generally regarded as the birth of liberation theology—"there has been an inevitable clarification of this theological undertaking…The years have also brought serious and relevant critiques that have helped this theological thinking reach maturity" (Gutiérrez 1988, xvii). This mature liberation theology stands not in opposition to the institutional church—though it may criticize its weaknesses—but rather has been absorbed, to a significant extent, into the framework of Catholic social teaching. This is as it should be. As Gutiérrez (1988, 174) insists in the conclusion of *A Theology of Liberation*, if this theology "does not lead the Church to be on the side of the oppressed classes and dominated peoples, clearly and without qualifications, then this theological reflection will have been of little value." Liberation theology was intended to convert the heart of the Church as whole, not to rebel against or split away from it.

The key concepts that not only prevailed within the movement, but then gained acceptance in the wider Church through the conference at Puebla, the encyclicals of John Paul II, and even the critical voice of the *Instruction on Certain Aspects of the "Theology*

of Liberation,*"* are what I consider the core of liberation theology. For this reason, when there are conflicts about what liberation theology is or what it means, I will tend to give greater weight to the more recent works of Gutiérrez and the Boff brothers, who have been key figures in the movement from its beginning and whose methodological exposition is regarded as "canonical" even by those who object to the direction they have taken more recently (Petrella 2017, 26-29). Since these works represent the mature expression of an evolving liberation theology and its eventual union with official church teaching, they have an especially important role to play in any interpretation of the movement as it is today.

I turn, now, to the key concepts of the mature theology of liberation—to the ideas which come back again and again, through different authors and in different ways, and which have, by and large, been accepted by the magisterium of the Roman Catholic Church. The most important concepts in liberation theology are the preferential option for the poor, praxis, integral liberation and social sin. These themes are of widespread importance, and play a particularly prominent role in the works of the "canonical" liberation theologians. Of these, the preferential option for the poor is undoubtedly the most central and most influential, as well as the least controversial. The others, however, remain critical to understanding liberation theology's methods and its goals for society and the church.

The preferential option for the poor is, in the mind of Gutiérrez, the heart and soul of liberation theology. This core concept has been fully embraced by the magisterium of the church, as Gutiérrez (2015, 6) notes in *On the Side of the Poor*, his most recent reflection on liberation theology. It is best understood as a commitment to making the

church “preeminently the Church of the poor,” in the words of Pope John XXIII (Sayer 2015, xiii). This preferential option does not imply that God and the church have no business with the well-to-do, but that they have a special love and a special responsibility to the “least of these” mentioned in the gospels. The inflection is not, as Clodovis Boff notes, “only the poor,” but rather, in a church that has sometimes neglected the needs of the oppressed in society in favor of pursuing personal holiness, “also, and especially, the poor” (Boff and Boff 1986, 21). The preferential option for the poor is, in the words of John Paul II (1987) in *Sollicitudo rei socialis*, article 42, “a special form of primacy in the exercise of Christian charity,” intended to highlight this commitment to live with and for God’s impoverished children. This does not mean the poor only from a socio-economic standpoint, but also women, racial minorities and indigenous peoples—all who experience oppression and marginalization (Boff and Boff 1987, 28-29).

Importantly, the preferential option for the poor is not paternalistic; it is not the church *for* the poor, but the church *of* the poor (Gutiérrez and Müller, 63). The church labors with, not on behalf of, oppressed and impoverished peoples. It may give help and guidance, but not pity, nor may it rob the poor of their agency or responsibility for their own lives. “The Church's preferential option for solidarity with the poor” write the Boff brothers, “implies that it is the poor themselves, ‘conscientized and organized,’ who must become the primary agents of their own liberation,” instead of living under the patronage or tutelage of the Church (Boff and Boff 1986, 55; Gutiérrez 1988, 174). Gutiérrez (2015, 45) adds, “the poor themselves must take charge of their own destiny.” The Church *of* the poor labors alongside the people in solidarity, rather than handing down gifts from a position of superiority. This desire to respect people’s agency—found throughout

liberation theology—is derived from the long Catholic tradition of acknowledging the dignity of the human being as an image-bearer of God (see *Gaudium et spes* articles 26, 27 and 29, among others).

The central idea of praxis in the Latin American tradition is closely related to the *kind* of theology it is. Liberation theology is, in the words of Gutiérrez (1988, 5-9), "critical reflection on praxis." It is built out of an ongoing reflection on and dialogue with the lived experience of poor Christians—lay people, clergy and religious alike—in Latin America. Theology is the second, derivative step in the process of liberation. First, there must be liberating action, a life lived in commitment and solidarity with the oppressed. Only then can faith reflect on that liberating practice (Boff and Boff 1987, 4-6). The product of this reflection is, properly speaking, the theology of liberation, but without this prior action there can be no liberation theology. Liberation theology "is impossible without at least *some* contact with the world of the oppressed;" it cannot be done in a vacuum (Boff and Boff 1987, 23). Nor do the ideas stand on their own without commitment to action:

> Before we can do theology we have to "do" liberation. The first step for liberation theology is pre-theological. It is a matter of trying to live the commitment of faith: in our case, to participate in some way in the process of liberation, to be committed to the oppressed. Without this specific precondition, liberation theology would be simply a matter of words…we need to establish a living link with living practice. (Boff and Boff 1987, 22)

Petrella, and other recent critics, sometimes worry that liberation theology has lost this link to living practice and focus on "doing liberation." If he is right, then the movement has indeed lost something crucial. It is this absolute necessity of practical commitment joined to any authentic theory of liberation that underlies the central principle of *praxis*, which has been a key liberationist concept since the beginning. Praxis is, as Craig Nessan

points out, not strictly speaking synonymous with practice, practice being the application of a theory to a given situation. Instead, he writes that:

> Praxis in liberation theology refers to a method which is exercised in a fluid interchange between thought and action, theory and practice. It is not the application of a preconceived theory upon practice, but instead *an encounter with historical reality which itself gives rise to thought within the context of engagement*. (Nessan 1989, 119. Italics in original)

Theory and practice thus inform each other; the use of the term “dialectic” would not be inappropriate, especially given the liberationists’ use of Marxist concepts. In liberation theology, praxis has priority over theory—not in terms of importance, but chronologically. Action predates reflection, but the two interact with each other in complex ways. As Nessan (1989, 18-19) points out here and elsewhere, liberation theology is deeply engaged with its social and historical context. The “praxis-orientation” is, in part, a commitment never to lose sight of the immediate, lived realities of poor Latin American communities.

Next comes the idea of integral liberation—the concept for which liberation theology is, in effect, named. The Church has always taught the message of liberation, in terms of Christ liberating his people from sin and death and reuniting with God. As John Paul II affirms, “Liberation is a faith reality, one of the basic biblical themes, deeply inscribed in the salvific mission of Christ, in the work of redemption, and in his teaching” (Boff and Boff 1984, 35). Liberation theology extended this classic belief in Christ’s redemptive liberation to include temporal, socio-economic, historical and political liberation as part of the process of redeeming the world (Boff and Boff 1984, 17, 21). Boff writes in *Salvation and Liberation*:

> This process...can be understood as…liberation from situations that contradict God's salvific design, for situations that gradually conform to that design.

> Historical liberations are thus anticipations and concretizations, ever limited, but real, of the salvation that will be full and complete only in eternity. (Boff and Boff 1984,18-19)

Liberation theology, then, takes seriously the coming of the kingdom of God on earth, and seeks political and social situations that are pleasing to a God of justice and mercy. It seeks to live out the prayer, “Thy kingdom come, thy will be done, on earth as it is in heaven.”

Integral liberation, then, means liberation from sin and death, and therefore also liberation from hunger, misery and oppression contrary to the will of God. As Jon Sobrino (1979, 302) writes, “There can be no evangelization without integral liberation, and the latter includes liberation from historical misery.” For liberationists, there is an unbreakable bond between the Church’s mission of evangelization and its pursuit of liberation from sin and death, in all their forms. Liberation theology, while endorsing the idea that both spiritual and temporal aspects of liberation are necessary, notes that historical and political liberation has, in Petrella’s (2017, 26) words, “primacy of urgency,” while spiritual liberation has “primacy of value.” These two aspects cannot, however, be legitimately separated. Boff writes, “In virtue of being precisely integral this liberation will brook no reductionism—mutilation—that leaves out either ‘liberation from sin’ or [from] ‘dependence and the forms of bondage that violate basic rights that come from God’” (Boff and Boff 1984, 38; quoting Puebla no. 485). Both aspects are necessary if liberation is to deserve the modifier “integral.” Integral liberation thus avoids the trap of two dangerous reductionisms—one political, the other religious—condemned by Paul VI in *Evengelii nuntiandi* (Boff and Boff 1984, 21).

The first temptation to reductionism is to insist on only the socio-economic and political aspects of liberation, to identify temporal liberation with God's salvation. As John Paul II warned, "It is a mistake to state that political, economic, and social liberation coincide with salvation in Jesus Christ; that the *regnum Dei* is identified with the *regnum hominis*" (Boff and Boff 1984, 32). Boff agrees, condemning perspectives that "take no account of the difference between salvation in Christ and historical liberation," and that would "presuppose an identification of history with eschatology" (Boff and Boff 1984, 32). On the other hand, the second reductionism tempts us to focus on liberation as salvation from personal sins to the exclusion of historical liberation movements. The conference at Puebla article 515 condemned this tendency in no uncertain terms, writing:

> …Christianity is supposed to evangelize the whole of human life, including the political dimension. So the church criticizes those who would restrict the scope of faith to personal or family life; who would exclude the professional, economic, social and political orders as if sin, love, prayer and pardon had no relevance in them. (CELAM 1979, 195)

The concept of integral liberation is intended as a rejection of both these temptations, and a recognition of Christ as lord and liberator of the whole person, in all aspects of life. It is an approach to liberation which is preeminently religious, focused on liberation from sin—but from corporate and social sin as well as individual misdeeds.

Even the critical *Instruction on Certain Aspects of the "Theology of Liberation"* agrees, saying "as a logical consequence, it [liberation from sin] calls for freedom from many different kinds of slavery in the cultural, economic, social, and political spheres, all of which derive ultimately from sin, and so often prevent people from living in a manner befitting their dignity" (*Instruction* 1984, intro). For the Congregation on the Doctrine of the Faith to affirm this point, in the midst of a document intended primarily to correct the

errors of liberation theology, does much to establish integral liberation as part of the wider conversation of faith within the Church.

A note is now in order about this idea of social sin, which is crucial to the liberationist understanding of society, and which has often made parts of the magisterium nervous. The language of social sin is embraced by the Puebla document, which claims in articles 28 and 29 that extreme economic inequality, such that some become opulently wealthy while others starve in misery, is "contrary to the plan of the Creator and to the honor that is due him. In this anxiety and sorrow, the Church sees a situation of social sinfulness…so we brand the situation of inhuman poverty in which millions of Americans live as the most devastating and humiliating kind of scourge" (CELAM 1979, 128). This is the general idea of social sin; that there are social situations contrary to God's will, generated by systems of violence and oppression on the macro scale. These systems are as truly sinful as more personal offenses such as adultery, and are in fact, though operating on a separate level, a manifestation of personal sinfulness. (Gutiérrez and Müller 2015, 17).

Having dealt with the central ideas of liberation theology at some length, I can now replace Christian Smith's rather cursory definition from earlier in this section with the more detailed version offered to us by the Boff brothers, who write:

> Reflecting on the basis of practice, within the ambit of the vast efforts made by the poor and their allies, seeking inspiration in faith and the gospel for the commitment to fight against poverty and for the integral liberation of all persons—and the whole person—that is what liberation theology means. (Boff and Boff 1987, 8)

Liberation theology, then, is reflection grounded in practice, bottom-up, gospel-driven, and profoundly religious. Its socioeconomic concerns flow from its commitment to the gospel, not from an independent, secular development project.

Controversies Surround Liberation Theology

This section is devoted to addressing three common and intimately related critiques of liberation theology. These criticisms appear reasonable at first blush, but are, I will argue, founded on misconceptions. The first of these three criticisms is that liberation theology is inappropriately Marxist and therefore morally and economically wrong, as well as ultimately sliding towards an atheistic and materialistic worldview. The second is that liberation theology takes an excessively this-wordly view of faith, through which it reads the Bible as a sort of parable of class struggle and liberation; this view is thought to rob Christ's sacrifice of its transcendent, salvific meaning. The third and final critique is simply that liberation theology is Catholic in name only, rebellious and innovative in a way reminiscent of the Protestant reformation, and that it opposes the "base" or grassroots of the Church to the hierarchy in a destructive way.

Liberation Theology, Marxism and Socialism

Liberation theologians have spent a great deal of time addressing the now-familiar complaint that liberation theology is "a Trojan horse for Marxism," which brings subversive and anti-Catholic ideas into the Church by stealth (Lernoux 1979, 21). By extension, it is thought, this "Marxist" liberation theology is a vehicle for spreading atheism and materialism throughout Latin American society and is ultimately a destabilizing force provoking Marxist revolution. This concern was fueled by the threat of Marxist revolution, which was in Europe a much more imminent prospect—with the

proximity of the Soviet Bloc—than it was in increasingly right-wing Latin America, where only Cuba was actually Communist (Lernoux 1979, 21). Vekeman's equation of the violent and revolutionary Christians for Socialism with the mainstream of liberation theology partakes of this fear, as does the Rockefeller Report's concern with "subversive penetration" of the Church and the rise of Marxism.

The first *Instruction* deals extensively with the perceived danger of Marxist influence on liberation theology. It was initially intended to deal exclusively with the issue of Christianity and Marxism. Chapter VII, which would have been the whole text, deals with the liberationist use of Marxist categories, arguing that it is dangerous to attempt to sever Marxist concepts from their fundamentally atheistic roots:

> Let us recall the fact that atheism and the denial of the human person, his liberty and rights, are at the core of the Marxist theory. This theory, then, contains errors which directly threaten the truths of the faith regarding the eternal destiny of individual persons. Moreover, to attempt to integrate into theology an analysis whose criterion of interpretation depends on this atheistic conception is to involve oneself in terrible contradictions. (*Instruction* 1984, VII: 9)

The *Instruction* treats Marxism as a "steel block" (Boff and Boff 1986, 66), as a coherent whole from which the various parts cannot be extracted and put to better use. It insists that the liberation theologians are opening themselves to a serious danger by accepting Marxist analysis, because, they claim, "If one tries to take only one part, say, the analysis, one ends up having to accept the entire ideology" including the "systematic class struggle" condemned by John Paul II (1981, III: 11) in *Laborem exercens*, and the implicit materialism and atheism mentioned above (*Instruction* 1984, VII: 6).

The Boffs contest this point about the indivisibility of Marxism, noting that Marxist concepts are in practice divorceable from their ideological matrix, and that

outside the context of the *Instruction* this possibility is generally recognized by the Church. He writes that:

> Even Cardinal Ratzinger…in a discussion with reporters on the occasion of the official promulgation of the *Instruction*…acknowledged that Marxism contains 'certain valid, useful elements, but a much greater degree of vigilance, and a much more conscious criticism, are in order' than those which might need to be exercised vis-à-vis any other non-Christian system (Boff and Boff 1986, 43).

Boff took this as implicit permission to continue making use of Marxist principles, with sufficient caution and criticism. He did, however, resent the inconsistency and the implication that Marxism is inherently more dangerous than liberal capitalism which has, in his mind, its own materialistic and atheistic tendencies (Boff and Boff 1986, 68).

To round out their argument that Marxist categories are not only separable from the whole ideological superstructure, but legitimate sources of Christian analysis, and that this truth is recognized by the wider Church, the Boffs add:

> ...Christian communities and the bishops of Latin America do use "elements" borrowed from Marxism—without, for all that, being bound up by its ideologies or having to wear the Marxist label and tip their hats to Karl Marx. Pope John Paul II does much the same in many of his own messages, especially in his encyclical *Laborem Exercens*, where he uses, with perfect freedom and against the horizon of faith, categories he borrows from Marx: alienation, exploitation, means of production, dialectic, praxis, and so on (see *Laborem Exercens*, no 11). (Boff and Boff 1986, 71)

The implication is that the pope, of all people, is not a Marxist, and if he can use Marxist categories to move beyond and through Marxism to a deeper, uniquely Christian truth, then so can liberation theologians.

The claim that liberation theology is just Stalinism or Castro-ism under another guise, or that it is, because of its Marxist element, ultimately inconsistent with a theistic world view, was deeply offensive to liberation theologians. The Boffs were quick to

insist that that liberation theology in general only borrowed Marxist categories and social critiques. The core of the message remains uniquely Christian. They write:

> It is the Gospel which is the determining qualifier of the theology of liberation, as it must be of any theology...Marxism is a secondary principle, a peripheral issue. When Marxism is used at all, it is used only partially and instrumentally. The popes themselves, the bishops, and many non-Marxist social scientists do the same thing. (Boff and Boff 1986, 22)

Not only is Marxism only of use "partially and instrumentally," but liberation theologians recognized that the historical forms of socialism were deeply problematic. "Liberation theology wants nothing to do with the ideological totalitarianism of communism with a Leninist and Stalinist stamp," recognizing in them the same repressive tendencies as in the right-wing regimes cropping up across Latin America (Gutiérrez and Müller 2015, 66). Even Juan Luis Segundo (1974, 4), whose "Capitalismo-Socialismo, «crux theologica»" is likely to make more traditional Catholic political theorists uncomfortable, wants nothing to do with existing forms of socialism, coming as they do from Eastern Europe, with ideological commitments foreign to the Latin American situation. Segundo (1974, 1-4), like liberation theologians in general in the early period, was interested in an "authentic Latin American socialism," and did not see his ideas as indebted to the actual practice of socialism in Soviet Russia.

It is in part because of this distancing from Soviet socialism—and the ongoing search for an authentic Latin American answer to the socialist/capitalist dilemma—that liberation theologians did not see their project as critically undermined by the failure of the Soviet experiment. Gutiérrez writes:

> . . .those who wonder if liberation theology remains valid after the events symbolized by the fall of the Berlin Wall…need to be reminded that the historical starting point for the theology was not the situation of the Eastern European countries. It was, and certainly continues to be, the inhuman poverty of Latin

> America and the interpretation we make of it in light of faith. What we have, then, is a state of things and a theology that, at their core, have little to do with the collapse of real socialism. (Gutiérrez and Müller 2015, 33)

Communism of the existing European variety never had much imaginative pull or theoretical influence in Latin America, and equating liberation theologians' idea of socialism with Soviet Communism profoundly misrepresents the issue. They are not knocked down by the fall of Soviet Communism in part because their ideological parents are not really—though they may borrow some ideas—Marx and Bultmann. Instead, "the real fathers and mothers of the theology of liberation are the hierarchical Church, in the context of an oppressed, Christian, Latin American people" (Boff and Boff 1986, 19-20). As I indicated in the last chapter, under this view, liberation theology must remain relevant at least until the situation of Latin America—that of a desperately poor and deeply Catholic continent—changes.

Finally, liberation theologians wanted to reject the atheism and materialism found in Marxism and to reclaim the useful parts of Marxist analysis as something deeply—and in fact, originally—Christian. They would argue that, contrary to what Marx himself would have us believe, important parts of Marxist theory were simply an appropriation and misapplication of earlier Christian concepts. Müller writes that those who use the term "Marxist" to criticize and delegitimize liberation theology "should not be suspicious of liberation theology in all of its forms simply because of its use of some Marxist ideas. Instead, they should investigate Marxism as an appropriation and secularization of the basic convictions of the Christian theology of history and eschatology" (Gutiérrez and Müller 2015, 77-79). Many of the key concepts of liberation theology, so the argument

goes, were Christian before they were Marxist. The Boffs write on the dialectic which informs liberationist “praxis:”

> It is important to note that this dialectic of theory-and-praxis is in no wise originally and exclusively Marxian, even though Marx gave it a specific formulation. This same dialectic lies at the basis both of patristic theology and of biblical revelation itself...The theology of the fathers was intimately bound up with the concrete problematic of their lives--theirs and that of their churches. Liberation theology is not as new as it might appear at first blush (Boff and Boff 1986, 16)

This idea that the ongoing conversation between theory and practice—between theology and the “concrete problematic” of Christian lives—is ancient and Christian, not new and secular, underpinned the liberationists’ understanding of their project. They were not, in their own eyes, doing something wholly new, but rather reimagining and reinvigorating the traditions of the Church. They thought they were reclaiming the useful aspects of Marxian social criticism for the Gospel, while rejecting Marx’s “atheistic view of human beings” in favor of the ancient theological anthropology of the Catholic Church (Gutiérrez and Müller 2015, 77-79).

It is true, however, that liberation theologians have always been, by and large, socialists, though exactly what that identification has meant has undergone important changes over the course of liberation theology’s development. While cautious in its use of Marxist ideas, ambivalent towards the idea of actual revolution, and irritated by comparisons to Stalinism and other Eastern European expressions of socialism, liberation theology was in its early days socialist in the classic sense. It made great use of socialist dependency theory, which held that Latin America was underdeveloped primarily because of exploitive relations with the developed capitalist core, of the distinction between capital and labor, the idea of the means of production—especially in the case of

Segundo, who wanted them "socialized" in the classic sense of the word—and even of the idea of class struggle, with "the poor" sometimes treated as a monolithic under class.

Many of these terms and concepts fell out of vogue after the fall of the Berlin Wall, to be replaced by a more abstract "socialism" as a commitment to certain kinds of goods in society. Though they continued to self-identify as socialist, in many cases, liberation theologians recognized that the "historical forms of socialism have historically exhausted themselves," and they had to seek a more general way of expressing their social commitments. This process—and the variety of responses within liberation theology to the fall of real socialism—will be discussed in greater detail in the next chapter. This shifting socialist identity needs to be understood through the lens of the Latin American conversation on socialism and capitalism, taking into account that these words have different meanings—both connotative and denotative—in Latin American theological discussions than they generally do in the US and the North Atlantic world.

First, the understanding of "capitalism," which liberation theologians have made one of their primary enemies: it must be understood that here capitalism does not refer simply to a system of private property and free enterprise, as it does in the North Atlantic world. Rather, it is also an ideology with distinctly un-Christian undertones. Müller explains:

> In the Latin American context, the word capitalism connotes the human striving without limits for a personal empire. Indeed, this striving is raised to the sole principle of human action. This kind of capitalism has nothing to do with a free-enterprise system in which men and women contribute their work and abilities in a social, free market economy that functions within a democratically constructed legal system. (Gutiérrez and Müller 2015, 24).

Advocates of free market capitalism in the West may very well argue that this definition does not accurately reflect what capitalism means; capitalism is a morally neutral or even

inherently positive economic system which cannot properly be treated as an exploitive ideological stance. This second definition is, however, how capitalism is in fact used in liberationist circles. To treat their attack on capitalism as equivalent to an attack on free enterprise and private property as such misconstrues the issue. The two definitions of capitalism are not entirely unrelated, either. In the eyes of liberationists, a certain brand of liberal capitalism (the policy) which Latin America has been encouraged to accept is closely bound up with capitalism (the ideology) which, like a purely secular Marxism, partakes of a dehumanizing and deficient anthropology (Gutiérrez and Müller 2015, 25). For the sake of clarity, I will attempt to refer to this this ideology or philosophy of the market as *unbridled* capitalism, but the liberationist use of the word must be understood and addressed.

Having looked more closely at the liberationist understanding of capitalism, I will now turn to their understanding of socialism as a contrary principle. To take the contemporary liberationist use of *socialism* to mean what F. A. Hayek meant by the socialism—that is, a command economy run by the central government—is again to mistake the issue (Hayek 1944, 32-34). While their early approach to socialism fit more neatly within the Hayekian definition, the content of the term has evolved since then. Instead, liberationists use s*ocialismo* in the sense rejected by Hayek (1944, 32), that is, as a vision of dignity and equality for which a society must strive. This view more closely accords with McClaverty's (2005, 187) loose definition of socialism "as a commitment to co-operation, community and solidarity, equality, planning and democracy" combined with the belief that "humans are social beings, share responsibility for each other and are

capable of bringing about beneficial social change," the emphasis being cooperative rather than competitive, in recognition of human vulnerability and interdependence.

This means that for contemporary liberation theology, socialism is more a vision of an appropriately inclusive and humane economic order than it is a detailed plan of governance. Müller, who provided the liberationist definition of capitalism, does the same for socialism:

> As an alternative [to exploitive capitalism] liberation theology speaks of socialism. With this proposal there is clearly intended not a planned and ordered economy. What is intended here is an economic system with the goal of the active participation of all people in the economies of their respective countries and also of the active participation of the underdeveloped nations in the global economic process. (Gutiérrez and Müller 2015, 68-69)

A systematically statist command economy is rejected as repressive, along with the hated totalitarianism of Stalinist/Leninist communism (Gutiérrez and Müller 2015, 66). Like capitalism, in this context socialism is not primarily an economic system—though it has economic aspects—but a worldview. It is a set of beliefs about human needs and rights, and about what makes a good and decent society which fully respects human dignity.

There is clearly an evolution of position here: liberation theology began with the socialism of Juan Luis Segundo (1974, 6), who advocated for a system which removes the means of production from the hands a few, self-interested people, and places those means in the hands of "superior institutions…in virtue of their care for the common good" (translation mine). The idea here, he hastens to assure us, is not to create some vast system indebted to a particular ideological scheme, but rather to reject existing forms of socialism (the implication, as always, being Soviet communism) while recognizing that the private ownership of a country's economic goods necessarily excludes some people—the poor—from benefiting from those goods (Segundo 1974, 4-6). The search for an

"authentic Latin American socialism" moved on, however, abandoning the commitment to socializing the means of production, along with dependency theory and other more problematic elements of the early model (Petrella 2017, 80-81). What is left is the social concern and egalitarianism of socialism, or socialism in McClaverty's sense, and, of course, the fundamental commitment to the full life and dignity of the poor.

Liberation Theology and "Immanentism"

The second accusation against liberation theology—connected closely to the first, that it is unrepentantly Marxist—is that liberation theology, with its focus on political, social and economic liberation and its rootedness in a specific time and place, undermines the transcendence and importance of Christ's redeeming work and substitutes a purely historical salvation. This "immanentized" faith is seen as a natural corollary to the importation of Marxist historical materialism. In their first *Instruction*, the Congregation for the Doctrine of the Faith writes that certain liberation theologians deny "Faith in the Incarnate Word, dead and risen for all men, and whom 'God made Lord and Christ'" and substitute instead "a figure of Jesus…who sums up in Himself the requirements of the struggle of the oppressed" instead of being primarily the son of God taking on the sins of the world (*Instruction* 1984, X: 11).

This is, they argue, a dangerous hermeneutical shift. The document worries that this means that "an exclusively political interpretation is thus given to the death of Christ. In this way, its value for salvation and the whole economy of redemption is denied" (*Instruction* 1984, X: 11-12). We are left, they warn, with a purely political Jesus, empty of theological meaning and concerned only with the historical and temporal liberation of the poor. The *Instruction* adds that applying this same "hermeneutical criterion" to the

relationship between the hierarchy and the base communities reframes this sacramental bond as fraught with class struggle and domination (1984, X: 15), thus undermining the important relationship between the Magisterium and the body of believers.

This criticism is also implicitly concerned with the liberationists' hermeneutical approach to scripture, which finds a liberation thematic woven throughout the Bible and its stories. These themes can be dangerous or misused—can, as the first *Instruction* warns, make Christ into a sort of hero of the proletariat, forgetting his role as the son of God—but they are certainly present in scripture. The liberationists choose to highlight this aspect, which they think has been too often overlooked. The exodus was, among other things, undoubtedly the liberation of a captive and oppressed people from their cruel foreign masters. Jesus was, among other things, a poor Galilean, who worked with his hands (*Instruction* 1986, no. 82). He may have been fully God and fully man, may have died for the sins of the world and risen again on the third day—but he was also a member of a racial and religious minority, who was slaughtered by a combination of religious and political machinations with the help of an oppressive military regime. It is easy to see how poor, religious Latin Americans might see echoes of their own struggles in Jesus' life and death, and then find hope in his resurrection.

A further example of the liberationists' approach to the Bible can be given by examining their reading of Mary. Marian theology has deep resonances for the theology of liberation: she is seen as "*Mary of Nazareth*, a woman who was poor, who toiled with her hands, who was harassed and persecuted, who was exiled" and also as "the *woman of the Magnificat*—the prophetic woman of liberation," as well as the Mary of Latin American popular religion, their particular saint and patroness (Boff and Boff 1986, 27,

emphasis in original; Boff and Boff 1987, 57). The Magnificat is a favorite text of liberation theologians: Mary, in the midst of praising God for the coming of Christ, sings, "he has put down the mighty from their thrones, and exalted those of low degree; he has filled the hungry with good things, and the rich he has sent empty away" (Luke 1:52-53, RSVCE). She gives voice to the many liberating promises of the Old Testament—from Exodus, Isaiah and Jeremiah, among others, and prefigures the Gospels' deep and abiding concern for the fate of the poor: in the Beatitudes, the concern for the "least of these" in Matthew 25, the rich young man in Matthew 19, and the rich man and Lazarus in Luke 16 among many other examples.

Ultimately, the second Vatican document responding to liberation theology—the *Instruction on Christian Freedom and Liberation*—supports this reading of a biblical theme of liberation, tracing it through Exodus and the Prophets, then turning to Mary, who "crosses the threshold from the Old Testament" with the Magnificat, and finally emphasizing the fullness of the liberating message of the Gospels (*Instruction* 1986, no. 43-50). God's concern for the poor, for the stranger, the widow, and the orphan, is amply evidenced throughout scripture, the Vatican tells us.

It is, of course, both possible and common for people, in their urgent attempts to end the sufferings of those around them, to lose sight of higher goods, to misidentify political liberation with salvation itself, instead of as a *part* of God's saving plan for the world. Liberation theologians are, it is true, in danger of slipping into this purely secular worldview. Liberation theology strives for a delicate balance which refuses to dichotomize history and material reality, on the one hand, from eschatology and spiritual concerns on the other. "Liberation theology," writes Müller, "leads…beyond the

inflexible scheme of a dualism between 'this world' and 'that world," and instead insists on,

> …an inseparable, unifying relationship between creation and salvation, faith and the world order, the appeal of transcendence and the orientation towards immanence, history and eschatology, the spiritual relationship to Christ and the identification with Christ in the life of discipleship" (Gutiérrez and Müller 2015, 27)

These two aspects—which we might simply call transcendent and immanent, as a way of gesturing at a more complex nexus of issues—must be wedded together. If liberation theology may slip towards the immanent, it is as counterbalance towards other tendencies in the wider church which tend to slide towards the purely transcendent (Gutiérrez and Müller 2015, 59-61). This point parallels the discussion of integral liberation: there must be no reductionism, no spiritual/temporal duality.

Liberation theology is not, then, inherently "immanentizing" to the exclusion of a transcendent, saving God or a universal church, nor is its hermeneutic inherently problematic. Instead, liberation theologians are committed to political holiness and to serving God in a particular time and place, as can be seen in their attempts to live in light of the Gospel, and to live out the Gospel in light of the "signs of the times," that is, responding to the material realities of their situation (*Gaudium et spes* 1965, no 4). This means, in part, that liberation theologians have a profound awareness of their historical position and are eager to make use of social sciences in their pursuit of the Kingdom of God.

Liberation theology was, from the first, deeply engaged with the social sciences, an approach which opened the theology to the accusations of secularism discussed above. This criticism was rooted in the fact that liberation theology broke with tradition in giving

a privileged role to social scientific analysis as dialogue partner—a role that had typically been reserved for the discipline of philosophy (Petrella 2017, 25). The privileged place for the social sciences was unique to liberation theology, and at first regarded as suspect. The Boffs write that opponents of liberation theology often charge that "the theology of liberation is an entirely 'secularized' theology--that it reduces faith to a strictly earthly ideology, hope to a purely temporal eschatology, and love to nothing but a political practice," but this is certainly not the intent (Boff and Boff 1986, 20). The goal, rather, is "political too," "earthly life too," and so on (Boff and Boff 1986, 20). This extension of the realm of theology does not weaken it, but gives it new breadth and depth.

While at times uncomfortable and unfamiliar, this historical awareness and critical engagement with the sciences is in fact a normal and sanctioned part of the Church's mission following Vatican II (*Gaudium et spes* 1965, no 40, 42-44). As Müller writes, the liberation theologians are concerned with "a description of the real world and the things of the world insofar as they relate to God," which is a properly theological task, but this description of the real world is understood to be impossible without "the assistance of the empirical sciences…of the social sciences, political science and economics," that is, without using the social sciences in the service of theology (Gutiérrez and Müller 2015, 58). Social science and its concerns for justice and economic equity do not replace, but rather inform, the theological action of the Church. If there is a criticism to be made here, it is not that liberation theology uses the social sciences, but rather that it uses them poorly, or not enough (Petrella 2017, 38-40). Again, this is an issue to take up in greater detail in the next chapter.

Liberation Theology and the Magisterium

The final critique is that liberation theology is inherently anti-Catholic, or anti-church hierarchy. It is seen, under this view, as a leveling and secularizing theology, opposing the base to the hierarchy on class warfare-style grounds and undermining the necessary relationship between local churches and the Magisterium (*Instruction* 1984, X: 15). It is, in short, seen as not really Catholic—disobedient, grass-roots and decentralized in an almost protestant fashion, and as noted above, re-reading scripture and tradition in a highly politicized and secularizing manner. Again, as in the accusation of rampant Marxism within liberation theology, the most telling piece of evidence may be the liberation theologians' self-concept and idea of what it is they are trying to do.

First and foremost, they are trying to reform or redirect the Church's emphases from within; they are seeking not to break with Mother Rome, but to reorient her towards the plight of the poor. I want to quote here again from Gutiérrez' conclusion to *A Theology of Liberation*. He writes:

> If theological reflection does not vitalize the action of the Christian community of the world by making its commitment to charity fuller and more radical, if—more concretely—in Latin America it does not lead the Church to be on the side of the oppressed classes and dominated peoples, clearly and without qualifications, then this theological reflection will have been of little value….We must be careful not to fall into…a kind of triumphalism of erudite and "new" visions of Christianity. (Gutiérrez 1988, 174).

The language here is all directed at revitalizing and transforming the existing Christian church, which in Latin America necessarily means especially the Catholic Church. While revolutionary, there is no separatist impulse. Gutiérrez even ends with a warning against self-satisfaction, against positioning liberation theology as something new and separate from the historical Church. There is a renovation, but no rupture.

The liberation theologians see themselves as deeply Catholic, responding to Vatican II—*Gaudium et spes* in particular (Gutiérrez and Müller 2015, 14)—to European theological conversations and patristic sources, and, as discussed above, to the Bible and to the deep cultural Catholicism of Latin America. I return to the Boffs' claim that "the real fathers and mothers of the theology of liberation are the hierarchical Church, in the context of an oppressed, Christian, Latin American people," and it is to these fathers and mothers that the liberationists look for inspiration, and to whom they appeal in support of their ideas (Boff and Boff 1986, 19-20). Liberation theology is, as Gutiérrez sees it, a response and contribution to a long theological conversation in the Church about social issues, beginning in the modern era with *Rerum novarum*, Pope Leo XIII's encyclical on the changed world in the aftermath of the industrial revolution (Gutiérrez and Müller 2015, 14; Pope Leo XIII 1891). Then came Paul VI's *Populorum progressio* (1967)*,* on "the development of peoples," Pope John XXIII's declaration that the Church must be on the side of the poor, and finally the writings of John Paul II which are perhaps the most comprehensive exposition and refinement of magisterial social teaching (Gutiérrez and Müller 2015, 14). The work of John Paul II includes *Laborem exercens* (1981) on the value of work, and *Centesimus annus* (1991) on the 100th anniversary of *Rerum novarum,* among other writings which reaffirmed the priority of labor over capital, the dignity of work, the right to the means of subsistence, and other key themes of classical social teaching (Gutiérrez and Müller 2015, 99). Liberation theology is in continuity with this social teaching. It does not replace but augments and applies it (Boff and Boff 1987, 37).

Liberation theology is not only in continuity with the Magisterial social teaching of the 19th and 20th centuries, but reaches back further yet, in what the Boffs characterizes

as a project of retrieval, to the patristic traditions of the ninth century and even earlier. Liberation theology seeks, they say, to "reincorporate [patrisitic theology's] deeply unitary sense of the history of salvation, its feeling for the social demands of the gospel, its perception of the prophetic dimension of the mission of the Church, [and] its sensitivity to the poor," all of which are deeply relevant to the Latin American situation. The liberationists remain in conversation not only with the modern Vatican, but with the ancient fathers and mothers, and such figures as "Francis of Assisi, Savonarola, Meister Eckhart, Catherine of Siena, Bartolomé de las Casas, and, from recent times, Frs. Hidalgo, Morelos and Cícero" and with contemporary theologians like J.B. Metz, Karl Rahner and others like them (Boff and Boff 1987, 36-37)

Furthermore, in addition to this continuity with and inward-oriented renovation of the Church, liberation theologians remain in obedience to the Catholic Church, and work within the guidance and limitations imposed on them by that organization. This is perhaps best seen in the attempts of theologians like Boff and Gutiérrez to refine and readjust their concepts in light of criticisms from the Vatican. They have worked to settle on language that will clearly convey their meaning and willingly disposed of the theory of dependency and of the more violent expressions of Marxist theory, which encumbered early versions of the theology (Boff and Boff 1986 12, 22-23; Gutiérrez 1988, xx, xxiv). This willingness to remain under the authority of Rome is also clear in Leonardo Boff's obedience to his summons to Rome, and then in his obedience to the year's period of silence imposed on him by Congregation for the Doctrine of the Faith (for Boff's narrative of this experience, see *Liberation Theology: From Confrontation to Dialogue,* chapters 15 and 16). While some theologians did jump ship, as it were, leaving the

Church entirely or requesting laicization, the most influential and the body of the movement remain earnestly Catholic.

Ultimately, as I proposed at the end of the last section, this Catholicity and willingness to remain within the mainstream Church has led to the widespread adoption of liberationist concepts. As I mentioned in the section on the key concepts of liberation theology, the central ideas of integral liberation and the preferential option for the poor have been embraced by Pope John Paul II in many of his writings, and have even been acknowledged as legitimate by the *Instructions*, as has the basic project of a theology of liberation. Our current Pope, Francis, is highly favorable to liberation theology, and even Gerhard Müller, who is considered a conservative and a sharp critic of Francis (Horowitz 2017), has coauthored a book with Gutiérrez praising the legacy of liberation theology. If liberation theology as an active movement has somewhat died out—to the distress of Ivan Petrella and Alastair Kee—it is because much of its philosophy has been subsumed into the greater whole of the Catholic Church, where it is quietly shaping church discourse and priorities. Its ongoing impact on the concrete situation in Latin America, however, is debatable. Petrella and Kee's concern that liberation theology has stalled in its pursuit of liberation, instead becoming stale and repetitive, is not without basis. This new criticism, that liberation theology has lost something crucial—especially, it is suggested, since the death of global socialism—and is therefore no longer relevant and useful, will be the focus of the following chapter.

CHAPTER 3: EVOLUTION AND CHALLENGES

I have, up to this point, painted a fairly positive picture of the progress of liberation theology, from its birth, through its controversies and even suppression, to its gradual acceptance by the broader church. There are, however, those who question whether liberation theology retains any relevance in a post-1991 world, given the apparent resounding triumph of liberal capitalism. This question is raised both by opponents of socialism and conservative elements in the church, who would be happy to see this still-radical movement disappear, and also by advocates and devotees of liberation theology, who fear that it has lost its usefulness. Whether one sees the triumph of capitalistic globalization as a cause for grief or for rejoicing, liberation theology's role—with its ties to a seemingly discredited economic model—is questionable. We must seriously consider the possibility that liberation theology has passed its heyday.

Liberation theology is a relatively young tradition—this paper, incidentally, marks fifty years since the conference at Medellín—and as such, it has been constantly evolving since its inception in the mid twentieth century. The question is whether those changes have, as Petrella in particular worries, emptied liberation theology of any concrete content, or whether they have helped to refine and clarify the theology. This chapter will discuss those changes on the whole in the first section, followed by a more thorough discussion and analysis of Petrella's challenge.

The Changing Face of Liberation Theology

There are three main shifts that have occurred within liberation theology since its inception in the 1960s. These changes are the increasingly "pure theology" way of thinking about the movement, as opposed to thinking of liberation theology as realized

through “historical projects”; the gradual divorce from a commitment to “real” socialism—Gutiérrez’s term, meaning socialism as it has actually been practiced in history (Gutiérrez and Müller 2015, 33)—with a concomitant abandonment of dependency theory; and an increasingly peaceable relationship with the Vatican after years of strife.

The Death of Historical Projects

The move towards a more self-consciously theological conception of liberation theology can best be understood in contrast to the movement’s initial commitment to the realization or manifestation of its theology through historical projects. Petrella (2006, viii) writes that “Latin American liberation theology was born with the promise of being a theology that would not rest with merely talking about liberation but would actually help liberate people from material deprivation,” and that this commitment necessarily had two parts, “a rereading of Christianity from the perspective of the oppressed and the construction of "historical projects;” models of political and economic organization that would replace an unjust status quo.” It is this last, the construction of the historical project, which has increasingly fallen by the wayside as liberation theology has evolved.

A historical project, in this sense, was a concrete expression of the ideas of liberation theology directed towards a historically transformative goal. These projects tied together the why and the how of liberation theology; they “brought together thinking about theological categories or ideals such as the preferential option and liberation and thinking about institutions,” recognizing the role of these institutions in actually creating a society that would care for the poor (Petrella 2006, 11). Historical projects also performed a number of specific functions within the liberationist discourse:

> First, they were the key way that liberation theology sought to pursue liberation concretely…. Second, historical projects were the means to give content to liberation theology's theological terms…. The third function of the historical projects … was one of differentiation between groups that at face value held the same ideals but differed in the understanding of their practical import. (Petrella 2006, 11)

The historical projects were not, under Petrella's view, merely the concretizations of the liberationist project, but also added specificity and context to their theological reflection and prevented the cooption of liberationist vocabulary by rival groups.

Petrella draws heavily on the work of liberation theologian José Míguez Bonino in his discussion of historical projects and of their importance for liberation theology as a movement. Bonino's definition is useful, in part because it highlights the fact that even historical projects can be more of a vague sketch than a concrete action plant. At times, Petrella seems to lose sight of this point. Bonino writes:

> 'Historical project' is an expression frequently used in our discussions as a midway term between an utopia, a vision which makes no attempt to connect itself historically to the present, and a program, a technically developed model for the organization of society. A historical project is defined enough to force options in terms of the basic structures of society. It points in a given direction. But frequently its contents are expressed in symbolical and elusive forms rather than in terms of precise technical language.... It is in this general sense that we speak of a Latin American socialist project of liberation. (Petrella 2006, 11-12)

Though Bonino goes on to develop seven points that he thinks are a necessary part of the liberationist historical project of the 1960s and 1970s (Petrella 2006, 12), it is clear from this quote that a historical project as such has no necessary content; that is, there could be different historical projects that would fulfill a similar role but answer to different descriptions. This is, I think, what Petrella wants: a new historical project to give liberation theology shape and direction, unencumbered by socialism and dependency theory.

The early importance of historical projects is reflected in liberation theology's initial commitment to socialism as the means of liberation. While Petrella (2006, 81) notes that Gutiérrez did not collapse socialism and liberation into one category, it was true that in his early work, liberation was expected to express itself historically through socialism. At first, "in *A Theology of Liberation* and other works of the period socialism played the role of being the worldly political embodiment of a liberation that could be fully completed only by God." Throughout the 1980s, this privileged role for socialism was undermined on two fronts: a change in the liberationist approach to theology, which de-emphasized concrete historical projects, and the fall of the Berlin Wall, which challenged the specific historical project of socialism. These two points correspond to the first two major changes in liberation theology, that is, the reaffirmation of liberation theology as "pure theology," and the gradual rejection of real socialism.

"Pure Theology"

By the early 1980s, the accusation that liberation theology was not *real* theology was leading Gutiérrez and the Boffs to re-emphasize the more formally theological elements of their work. It was not that the liberation theologians had ceased to be interested in enacting liberation concretely, (as Petrella implies) but rather that they were increasingly insistent that liberation theology is truly *theology*. This is, I suggest, in response to the fact that:

> As Gutiérrez frequently points out, liberation theology is often misunderstood by its advocates and its opponents, both of whom hold that the liberation theologians are primarily interested in the social and political dimensions of human life, and in this, they work somewhat amateurishly in areas, such as economics, politics and sociology, that are unfamiliar to them. (Gutiérrez and Müller 2015, 26)

To a movement oriented in part by the ancient theological traditions of the Catholic Church, and that "in itself wants to be pure theology in its method and results," such an accusation would require a response (Gutiérrez and Müller 2015, 58).

This response was to reaffirm the nature of theology as primarily a "discourse about God," while at the same time retaining earlier praxis-oriented definitions of *liberation* theology. This new emphasis was meant as a complement and a corrective, not a replacement, to the early formulations. The Boffs, while retaining a canonical description of the methodological approach of liberation theology—theological reflection following pre-theological practice—emphasize the special role of liberation theology as *theology*, complete with a spirituality, an eschatology, a Christology, a hermeneutics, and an ecclesiology (Boff and Boff 1987, 24-30).

Gutiérrez likewise takes a more traditionally theological emphasis. To his initial description of liberation theology as a "reflection born of the experience of shared efforts to abolish the current unjust situation and to build a different society, freer and more human," Gutiérrez added that theology itself is primarily a "discourse about God," which takes place within the church (Petrella 2006, 81). Later yet, in his 2015 book *On the Side of the Poor*, Gutiérrez writes that "theology is a speaking about God in the light of faith, a language about the one who is, in truth, its only theme" (Gutiérrez and Müller 2015, 3). These are complementary points; theology can be both a discourse about God, generally, and in the specific case of liberation theology, the search for a liberating practice that reflects God's will for his children.

This continuity between the old and the new discussions of theology can be seen throughout *On the Side of the Poor*. Gutiérrez is still interested in faith as reflection on

practice; he notes that this "speaking about God" necessarily "takes place in a constantly changing historical reality in which the ecclesial community lives" and furthermore that theologies must by their very nature be "closely linked to questions that come from life and from challenges that the Christian community faces" (Gutiérrez and Müller 20156). Meanwhile, Gerhard Müller, who as the representative of the Vatican and a German bishop might be reasonably expected to take a more conservative or revisionist approach to liberation theology's past, reaffirms Gutiérrez's early discussion of theology. He quotes at length and with approval from the most recent edition of *A Theology of Liberation*, from a passage beginning, "Theology as a critical reflection on historical praxis is a liberating theology, a theology of the liberating transformation of the history of humankind…" (Gutiérrez and Müller 2015, 17). This is the classic exposition of the liberationist understanding of theology, and it is still an important part of the movement.

While the "pure theology" view of liberation theology did not exactly replace what we might call the "practical theology" view, Petrella is right to identify a change here. There is an undeniable shift from focusing on direct action and concrete historical projects towards a discussion of God and his will in the context of history. It is Müller, ultimately, who provides a modern description of liberation theology:

> Liberation theology is driven by the strict sense of the word theology. In this orientation, it undertakes a description of the real world and the things of the world insofar as they relate to God. It holds that a description and comprehension of the actual relationships in which people interact are not possible without the assistance of the empirical sciences, in other words, of the social sciences, political science and economics…Further, liberation theology understands that theological inquiry is related to people's active, transforming and practical participation in God's initiated and comprehensive liberating action—the action through which God qualifies history to become one process of efficacious freedom. (Gutiérrez and Müller 2015, 58-62)

There is still something clearly and recognizably liberationist here, especially in the commitment to the social sciences, nor is this statement of liberation theology's aims and methods incompatible with earlier formulations. It is also clear that something important has changed, at the very least in terms of tone and emphasis.

I will note, however, that liberation theology's relinquishment of historical projects does not mean that it ceases to be a practical theology, based in real world experiences and interested in actual liberation. This point will be developed further in the following chapter. Liberation theology has, in abandoning large-scale historical projects, merely declined to specify in a magisterial, once-and-for-all style, how the vision of liberation is to be achieved. Given the fate of its preferred historical project—that is, "real" socialism—this reticence and openness to contingency seems wise.

The Abandonment of Socialism

The second major change for liberation theologians—following the fresh emphasis on liberation theology as *theology*—was the gradual abandonment of their commitment to "real" socialism, that is, socialism as it has existed in history. This, like the first change, pushed them away from the category of historical projects in general. Faced with the apparent collapse of socialism as a viable society-transforming historical project, the liberation theologians were forced to extricate their theology from its commitments to socialism if it was to survive and continue to be relevant and useful. Petrella identifies three main responses to this problem.

The first of these strategies is what Petrella calls the "reassertion of key ideas." This strategy was used by Gutiérrez, Juan Luis Segundo, and Jose Maria Vigil, among

others. The approach is simple and intuitive, consisting of three argumentative steps. These theologians claim that:

> (a) liberation theology was never intrinsically tied to any particular social–scientific mediation or historical project;
> (b) the discrediting of a particular mediation and/or historical project thus cannot affect liberation theology's core intuitions or ideas;
> (c) the current worldwide situation of growing inequality makes liberation theology's central intuitions as necessary as ever. (Petrella 2006, 3)

Under this view, liberation theology's key message and its mandate remain unchanged. This approach emphasizes something that even Petrella recognizes:

> It is true that liberation theology, despite what many critics claim, rarely fully identified with any mediation or historical project. Thus the discrediting of such a mediation does not touch the heart of liberation theology with its focus on the poor, the construction of God's reign and liberation (Petrella 2006, 4).

The problem, he thinks, is that the basic elements of liberation theology are supported in a way that undermines the theology as a whole—"What allows this position to work is the emptying of the idea defended," so that key terms in liberation theology become effectively meaningless (Petrella 2006, 4).

Petrella calls the second response to the fall of socialism "revising basic categories." This position builds on, rather than rejecting, the stance taken by Gutiérrez and Sobrino. It agrees that the heart of liberation theology has survived the fall of global socialism, is essentially unchanged, and still critically important. It takes a slight turn—or perhaps goes a step further—in recognizing the flaws of some early liberationist concepts and revising them in light of experience or of new information. These "revised categories" include rejecting "the focus on revolution, the understanding of the poor as history's driving force, [and] the emphasis on capturing state power," all of which are left behind in light of new thinking (Petrella 2006, 5).

These changes are useful, opening liberation theology up to a more serious engagement with civil society, especially through the CEB's, and freeing it from the alarming tendency to treat the poor as a morally virtuous, monolithic entity (Petrella 2006, 6-7). As Petrella remarks, "The rejection of the poor or the people as a unified revolutionary subject avoids an idealization of the poor as a class as well as the temptation toward revolutionary violence," thus resisting the weaknesses of Christians for Socialism and other fringe groups. Even Gutiérrez (1988, xxiv) participates in this trend to some extent, admitting that his early use of dependency theory was misguided and rejecting it as a useful category for the future. For Petrella, however, this move falls short of successfully generating a replacement for socialism as the key historical project. It is good, certainly, to rid the movement of outdated or unhelpful terms, but it does not launch liberation theology in the direction he wants it to go.

The third and final approach to redefining liberation theology in the absence of a socialist project is perhaps the most explicitly religious, and the most fascinating. Petrella (2006, 8) calls this the "critique of idolatry," exemplified by the work of Franz Hinkelammert. This position "develops a critique of the idolatrous nature of capitalism and modernity more generally," and makes the following arguments: "(a) for liberation theology God is a God of life; (b) an idol is a god to whom lives are sacrificed; (c) capitalism and modernity are examples of idols since they take priority over human life." Petrella (2006, 9) quotes Hinkelammert's assessment of the Latin American situation: "the exclusion of a growing number of persons from the economic system, the destruction of the natural bases of life ... are the nonintentional results of this reduction of rationality to rentability," that is, of an economistic conception of humanity where

decision making is always driven by the profit motive. Hinkelammert adds that there is a certain self-destructive irrationality to this system, because "the market laws of total capitalism destroy society and its natural environment" which are, after all, the basis of any economic system (Petrella 2006, 9). This sort of rough, undomesticated capitalism self-cannibalizes by undermining the fabric of human society.

Though Petrella focuses on Hinkelammert, it is worth noting that this "critique of idolatry" is a widespread theme in liberation theology. He treats the "unmasking of idols" as part of the "Marginal View" within liberation theology, but the belief that "economics is idolatrous in that it prioritizes the wellbeing of an abstractly understood market economy over human life" (Petrella 2006, 33) is a common theme even among the "canonical" liberation theologians. Müller and Gutiérrez both reference this idea in *On the Side of the Poor* (2015, 26, 29, 49, 101, etc.), while Gutiérrez's book *The God of Life* (1983) develops the theme of a God of life—as opposed to an idolatrous god of death, mammon—at some length. Liberation theology's criticism of capitalism and liberal economics as idolatrous is unique, and uniquely religious—no mere Marxist would think of framing liberal capitalism and its associated world view and philosophy as an issue of idolatry.

There is, Petrella thinks, a common problem with these three responses. Once liberation theology had cut ties with socialism and dependency theory, it was left with a one-dimensional critique of capitalism and seemingly no viable counterproposal. It did, however, maintain a nominal commitment to the vague and idealistic "socialism" presented in the last chapter. I return to Müller's comment that as an alternative to this "unbridled capitalism," "liberation theology speaks of socialism" as "an economic system

with the goal of the active participation of all the people in the economies of their respective countries and also of the active participation of the underdeveloped nations in the global economic process," which is a laudable goal, certainly (Gutiérrez and Müller 2015, 68-69). While not entirely empty of content—participation and solidarity being key themes, along with a recognition that humans are primarily social beings, not individuals existing in a vacuum—this new socialism gives relatively little direction to practical projects of liberation. In the eyes of Petrella, this ambiguous "socialism" is woefully insufficient without a 21st century historical project for liberation theology (Petrella 2006, 5).

Relations with the Vatican

The final shift within liberation theology was in its relationship to the Vatican. This can be seen as a response to liberation theology's weakened impulses towards socialism and Marxism, and as a product of increased dialogue and understanding between the theologians and the Vatican. This growing confluence is visible in the work of John Paul II, who ordered the expansion of the first *Instruction* (as mentioned in the last chapter) because he found it "too purely negative" (Boff and Boff 1986, 42), and who strongly endorsed the preferential option for the poor (Gutiérrez and Müller 2015, 89; *Sollicitudo rei socialis*). Likewise, Gutiérrez's final chapter in *On The Side of The Poor* was begun in 1996 in a three-day discussion with a small circle of people from the CDF including then-Cardinal Joseph Ratzinger (Sayer 2015, xiii).

This chapter, "Where Will the Poor Sleep?" (first published as "¿Donde dormirán los pobres?"), embodies Gutiérrez's ongoing concern for the poor and their welfare and his deep-seated discontent with the current economic system. His demands for economic

justice are complemented by a reemphasis on the proper work of theology as first and foremost about and directed towards God. The two aspects, for Gutiérrez, are not in tension, but fundamentally interrelated. This chapter represents Gutiérrez's mature thought, full of subtlety and passion, and it was written in conference with one prefect of the CDF—Ratzinger—and published years later in a book co-authored with a his successor. Liberation theology and the Vatican have come a long way since the silencing of Leonardo Boff in the 1980s.

This process is, I want to suggest, best conceptualized as a period of mutual adjustment and refinement of opinions, bringing liberation theologians and the Vatican slowly into a situation of greater respect and understanding. Joseph Sayer writes, in his brief discussion of the colloquium that produced "¿Donde dormirán los pobres?" that Cardinal Ratzinger and Gutiérrez became better acquainted with each other and grew to respect each other's beliefs and intentions. The Cardinal later wrote about the event, "we have entered into a dialogue with him [Gutiérrez]—part of which I personally led—and, as a result, have come to a better understanding" and seemingly, towards some understanding of liberation theology which would be acceptable to both parties (Sayer 2015, xiii). Sayer adds that this dialogue

> …helped us to better understand Gutiérrez, and he came to see the one-sided character of his [early] work. As a result, he has developed his thought into a form of "liberation theology" with the right content and with a form capable of wider integration into theology. (Sayer 2015, xiii)

This "form capable of wider integration" is a liberation theology which had passed through the changes discussed in this section: a gradual divorce from certain socialist commitments, a new emphasis on the "properly theological" and spiritual aspects of the

movement, and a positive—productive, respectful, and still nonetheless at times conflictual—relationship with the institutional church.

The increasingly peaceful relationship with the church hierarchy seems to be a normal and healthy part of the development of any theology. The liberationists themselves do not pretend to have gotten everything right the first time, nor do they put themselves outside of the church and her authority. The Boffs admit that liberation theology "may have its limits as we have it today—its limits, its ambiguities, and yes, even its errors. It recognizes this" (Boff and Boff 1986, 12). While continuing to believe that they are in the right—that for all its flaws, the theology's "course is true" (Boff and Boff 1986, 12)—the Boffs responded seriously to the *Instructions*, especially in *Liberation Theology: From Confrontation to Dialogue*. To do otherwise would invite the false triumphalism against which Gutiérrez warns at the end of *A Theology of Liberation*, while ignoring their mandate to convert the Church to the side of the poor (Gutiérrez 1988, 174). A self-consciously Catholic movement like liberation theology (a description I argued for in a previous chapter) cannot simply declare that the institutional church has nothing to teach it; rather, it must take seriously any warnings and correctives that are offered, while still providing unique insights that enrich the church as a whole (Gutiérrez and Müller 2015, 7). This is, I argue, what has happened in the course of liberation theology's fifty years of arguing with the institutional church.

On the other hand, Petrella suggests that this shift can be best described as the Vatican's gradual appropriation of liberationist concepts, in such a way as to rob those concepts of their original force and meaning. Petrella (2006, 8) deals at some length with the functional "emptying" of liberationist concepts due to the lack of concretizing

historical projects, so that liberation, the preferential option for the poor, and other key ideas are expressed vaguely enough that they can be claimed by opponents of liberation theology. He is mostly concerned, in this discussion, with the appropriation of liberationist terms and concepts by the IMF (Petrella 2006, 8; 38-39), but he indicates in a number of places that the Vatican does the same thing. He quotes Marsha Hewitt's thought that "both Instructions appear to have succeeded to some extent in co-opting liberation theology in terms of re-orienting it more in the direction of discourses about liberation, thereby weakening its critical, practical force," in other words, domesticating it and making it more palatable to the rest of the Church (Petrella 2006, 82). This concern that discourse equals domestication is undoubtedly behind some of Petrella's critique of the "pure theology" current within liberation theology since the early 1980s.

It is worth noting in response to this interpretation that Petrella's book was originally published at the end of the pontificate of John Paul II, and republished during the brief pontificate of Benedict XVI, who as Cardinal Ratzinger had been one of liberation theology's most determined critics. It is in this context that Petrella writes about liberation theology's failures. He adds that liberation theology is further undermined by the lack of a "a supportive ecclesial context…the Vatican no longer supports liberation theology," a comment which seems odd today but may have reflected the realities of the papacy of Benedict XVI (Petrella 2006, 93). The two *Instructions* were issued by the CDF during Cardinal Ratziner's tenure there, and he was responsible for Leonardo Boff's silencing. Even after the thaw between the Vatican and the liberation theologians, it might very well seem, during the years in which Petrella was writing, that the Vatican, with Ratzinger/Benedict XVI at the helm, was still attempting to suppress

liberation theology. This is still too great a simplification, however; it is complicated by the mutual respect that Gutiérrez and Ratzinger seem to have had for each other, as well as by the fact that it was Ratzinger—as Benedict XVI—who appointed Cardinal Gerhard Ludwig Müller, a liberation-friendly prefect of the CDF.

Since the beginning of the pontificate of Pope Francis, however, the Church's openness to and acceptance of key aspects of liberation theology—as I outlined in the last chapter—has been reaffirmed. José Bergoglio himself is Latin American, raised in conversation with liberation theologians and seemingly quite open to their ideas. Pope Francis's own commitments to liberation—in a post-Marxist, "thoroughly theological" sense—are clear, if not always explicitly expressed. His concern for the poor and marginalized pervades both *Laudato Si'* and *Evangelium Gaudium,* but the second chapter of the latter is particularly instructive. Pope Francis condemns the dominant and dehumanizing global economic system (*Evangelium gaudium* 2013, no. 52-53), and continues, "Just as the commandment 'Thou shalt not kill' sets a clear limit in order to safeguard the value of human life, today we also have to say 'thou shalt not' to an economy of exclusion and inequality. Such an economy kills," a criticism which could have been taken straight from the writings Gutiérrez or Sobrino. He adds that "Human beings are themselves considered consumer goods to be used and then discarded," (no 53), a passive-voice echo of Gutiérrez's active-voice claim that it is the capitalist economy that treats humans in this way (Gutiérrez and Müller 2015, 49, 118).

Pope Francis then turns to a criticism of the prevailing economic beliefs in the developed world. He chastises those who "continue to defend trickle-down theories which assume that economic growth, encouraged by a free market, will inevitably

succeed in bringing about greater justice and inclusiveness in the world," adding that this defense lacks empirical support and "expresses a crude and naïve trust in the goodness of those wielding economic power and in the sacralized workings of the prevailing economic system" (*Evangelium gaudium* 2013, no. 54). Again, this is an echo of Gutiérrez (Gutiérrez and Müller 2015, 48-49,) Petrella (2006, 9), and especially Jung Mo Sung, one of the less-mainstream theologians (Petrella 2006, 33). The next section, unsurprisingly at this point, is entitled, "No to the new idolatry of money," and continues:

> The current financial crisis can make us overlook the fact that it originated in a profound human crisis: the denial of the primacy of the human person! We have created new idols. The worship of the ancient golden calf (cf. Ex 32:1-35) has returned in a new and ruthless guise in the idolatry of money and the dictatorship of an impersonal economy lacking a truly human purpose. (*Evangelium gaudium* 2013, no. 55)

This does not contain, it is true, any references to socialism or to the concrete historical projects which Petrella considers to be so crucial. If, however, one considers what liberation theology is actually doing and saying in the present moment—not what Petrella thinks it ought to be doing—it is abundantly clear that Pope Francis's writings and concerns are part and parcel with the liberationist message.

In addition, Pope Francis has demonstrated a deep respect and affection for the liberation theologians themselves. This past May, he famously wrote to Gutiérrez on the occasion of the theologian's ninetieth birthday, thanking him for his work on behalf of the poor, blessing Gutiérrez and asking the "father of liberation theology" to pray for him. In a similar vein, the church under Francis has just completed (as of October 14, 2018) the canonization of Archbishop Óscar Romero, a folk hero of liberation theology, who was killed in San Salvador in 1980. Gutiérrez writes that the preferential option for the poor has been "signed and sealed with the blood of those who, as Archbishop Romero

used to say, have died with ‘the mark of a martyr,’” a group which includes “the archbishop of San Salvador himself” (Gutiérrez and Müller 2015, 52). His canonization means the acceptance by the wider church of a liberation theologian as a saint, as a man of great holiness and a hero of the faith.

All of the changes documented in this section have led to the increased acceptance by the greater Church of a formerly marginal—some might even say deviant—theology. In the eyes of Ivan Petrella, Alastair Kee and others like them, however, liberation theology has been domesticated and hollowed out by this process. Petrella writes that is “Small wonder that liberation theology seems stagnant; small wonder that many think liberation theology is dead... Indeed, I believe that most contemporary liberation theologies are 'liberation' in name only. They cannot deliver on what they promise,” and have therefore failed in their mission of genuine liberation (Petrella 2006, vii). It is a harsh charge from a scholar who obviously loves liberation theology, and has produced a remarkably subtle analysis of its growth and development. It is a challenge which must be taken seriously.

The Critique

The core of Petrella’s challenge to liberation theology as it is currently practiced centers around the movement’s inability to generate new historical projects as vehicles for concrete liberation and as viable alternatives to the capitalism it critiques. Petrella notes the changes I have been discussing, and worries that they have transformed liberation theology into a theology which only talks about liberation, without being engaged in a genuinely liberating process. The abandonment of historical projects, he worries, has replaced substantive liberation with the same “lyrical and vague” defense of

human dignity against which Gutiérrez warned in the movement's early days (Petrella 2006, 82). Without historical projects, Petrella worries that liberation theology has been left without concrete content—without practical implications, without a useful analysis of the current economic system, and without a distinctive vocabulary resistant to cooption by its opponents.

Theology and the Social Sciences

The source of this failure to generate new historical projects is, Petrella argues, is in part due to liberation theology's confused and unproductive relationship with the social sciences. As noted earlier, liberation theology has from the start maintained a special role for the social sciences as informants and dialogue partners for theology. This role is, in fact, one of liberation theology's distinctive contributions—part of what sets it apart from classical Catholic social teaching, which shares liberation theology's concern for the poor and oppressed (Gutiérrez and Müller 2015, 58). These teachings have much to offer, but liberation theology adds "at an epistemological level…the social sciences and national economics" as part of its approach to diagnosing and resolving issues of oppression (Gutiérrez and Müller 2015, 58, 60). This unique blend of science and religion can, if done well, prove invaluable.

Liberation theology's initial commitment to the use of the social sciences in its methodology was, however, complicated by the fall of socialism and the rise of its self-description as pure theology. Petrella (2006, 25) writes that in the North Atlantic world, "commentators note a shift in the last decade away from the social sciences toward more 'traditional' theological and religious themes," and tend to assume that liberation theology has outgrown its emphasis on the social sciences. This is sometimes celebrated,

sometimes mourned, and often attributed to the failure of socialism as an interpretive lens. Liberation theology's appeal to the social sciences was, at first, primarily through Marxist analysis; when that failed, it was left with an undefined relationship to social and political theory.

This narrative—that liberation theology was once interested in the social sciences, but has now fallen back into the kind of theological and philosophical reflection typical of other theologies—certainly overstates the situation, and fails to note an important caveat. Petrella claims that, unrecognized by the Western academy and often by the liberationists themselves:

> …there is no consensus among liberation theologians as to the exact role the social sciences must play in their task. Thus the first part of this narrative is accurate: liberation theologians did in fact stress the social sciences as intrinsic to their theology, the second part, liberation theology's supposed abandonment of social science analysis, is less so. (Petrella 2006, 25).

The social sciences remain, at least nominally, intrinsic to liberation theology, but the role given to them varies—there is no consensus as to what it should be.

Petrella identifies two major camps in this methodological debate—the canonical view, including Boff and Gutiérrez, among others, and the marginal view, focused on Jung Mo Sung and to a lesser extent Juan Luis Segundo. The canonical view, elaborated by the Boffs in a number of contexts, gives four steps for "doing" liberation theology: first, participating in the struggle of the poor and their pursuit of liberation, second, analyzing and understanding that struggle through the social sciences, third, judging society and its systems in light of faith, as informed by tradition and the Bible, and fourth, with the understanding gained by the previous steps, taking action to further the liberation of the oppressed (Petrella 2006, 31; Boff and Boff 1987, 22-39). The Boffs

insist that only steps three and four are properly theological, thereby preserving a clear distinction between the theological and the sociopolitical aspects of liberation theology.

Sung collapses this distinction, arguing that there is no additional value generated by this exclusively theological reflection. Instead, he argues that the socio-analytic mediation is itself already properly theological. Sung argues for a “closer link between theology and the social sciences;” his approach to the relationship between theology and the social sciences would minimize the distinction between the two disciplines, especially as regards economics. Liberation theology, under this view, takes “the theologian squarely into the economic realm. . . . The social sciences do not just read reality, they are the realm where God’s promise of life fails or succeeds” (Petrella 2006, 33). The “formally theological,” under this view, “cannot be reduced to rereading the Bible or tradition” as it is in the Boffs’ formulation (Petrella 2006, 33). Theology is not just concerned with economics; economics is itself “properly theological.”

Generally speaking, Petrella approves of this move, but he feels that Sung and his adherents have not gone far enough in giving the social sciences a concrete and useful role within liberation theology. He notes that “according to the marginal position there is an intimate link between theology and at least one of the social sciences – economics” (Petrella 2006, 34), but that this link does not translate into a robust relationship between liberation theology and social science in general. Petrella (2006, 35) writes that “The alliance with some strains of social science…is merely to facilitate the critique of other strains, and at no point moves toward designing concrete institutional alternatives to dominant idolatry,” therefore leaving liberation theology, as before, without concrete solutions to the problem of market idolatry. The recognition of economics as a

“theological realm” is a step in the right direction for Petrella (2006, 34), but he feels that Sung, like Boff, “fails to see the potential theological import the social sciences can play in constructing historical projects.” There is no practical integration of the social sciences into the work of liberation theology, at least not in the form of generating new historical projects.

Instead, Petrella (2006, 38) argues, the marginal and canonical positions both retain a strict division between theological and sociopolitical analysis, though this seems somewhat contradictory in light of his discussion of Sung’s treatment of economics. In the canonical position, the split is clear; it is maintained by the division between the second and third stages of analysis, that is, between “seeing” with social science and “judging” in the light of faith. In the marginal position, the boundary between the two is blurred, but the work of liberation theology stays in the realm of criticizing capitalism, not constructing new alternatives. Both, without a more significant role for social sciences—without collapsing the theological/sociopolitical dichotomy—cannot produce new historical projects (Petrella 2006, 38-39).

Petrella proposes an alternative: in order to make the generation of new historical projects a viable possibility, liberationists should collapse the distinction between the theological and the sociopolitical, thereby giving their theory concrete institutional content. He does admit, however, that the division between the theological and the sociopolitical is standard within liberation theology, and that neither the “canonical” nor the “marginal” approach to liberation theology follows his alternative path (Petrella 2006, 38-40). In addition, none of the other liberation theologies—that is, Black, Feminist, Queer, Latina, etc.—follow Petrella’s way forward (2006, 132). One might interpret this

as a widespread failure within liberation theologies in general, or as Petrella asking for theologies of liberation to be something that they are not.

Maintaining the orthodox division between the sociopolitical and theological does not necessarily, as Petrella (2006, 38-39) has claimed, deny the social sciences a useful, practical role in the achievement of liberation, but rather puts them in a proper relationship to theology. Without this division between the theological and sociopolitical aspects of its work, liberation theologians are yet again open to the criticism that they "work somewhat amateurishly in areas, such as economics, politics and sociology, that are unfamiliar to them" and that they "lose sight of theology's proper theme, namely, the fundamental relationship of the human being to God" (Gutiérrez and Müller 2015, 26). Without its growing self-conception as "pure theology," liberation theology—which is, after all, primarily done by theologians with social scientific interests, not social scientists—risks being transformed into nothing but bad social science with a moralistic overlay. Social science and theology have different competencies. Attempts to blend them into a "religiously clothed sociology" or a "socio-theology" would weaken both (Gutiérrez and Müller 2015, 18).

Capitalismo-Socialismo versus TINA

The second aspect of Petrella's critique—which I find more compelling—is his point that liberation theology remains trapped in the classical capitalism-socialism split of the mid-to-late twentieth century, but without socialism as actually practiced presenting a viable alternative. The socialism option from Juan Luis Segundo's "Capitalismo-socialismo: crux teologica" had been more or less knocked out, and liberation theology—like the rest of the world—was left, apparently, with nothing but a capitalism shaped by

economic liberalism and seemingly unmoved by anything but unconditional profit maximization. Liberation theology has, nonetheless, continued to criticize capitalism, but by failing to provide or at least endorse viable alternatives to monolithic capitalism, the liberationists have implicitly accepted the famous TINA principle—the idea that "there is no alternative" to free-market globalization, sometimes called "neoliberalism" by its detractors (people like Tom Chodor, David Harvey, and Alistair Kee).

The TINA narrative emerged from the wreckage of the old socialism-capitalism dichotomy. After a decades-long battle between the two ideologies and an extended socialist project in the form of Soviet Russia, China and Cuba, socialism abruptly lost its status as a credible challenge to the capitalist status quo in the West. The fall of the Berlin Wall, writes Milton Friedman (2002, viii), "brought to a dramatic end an experiment of some seventy years between two alternative ways of organizing an economy…it is now taken for granted that central planning is indeed *The Road to Serfdom.*" What had once, in Segundo's words, been a choice or an "option" between competing visions of human life and human society had become a matter of necessity; capitalism was the only possibility.

All of this led, famously, to Margaret Thatcher's pronouncement that "There is no alternative"—abbreviated as TINA—to free-market economics on a global scale (Chodor 2015, 8-9). The TINA principle is implicit in the work of Chilean economist Hernando de Soto (2000, 1), who writes that following the fall of Berlin Wall, "Capitalism alone stands as the only feasible way to rationally organize a modern economy," a fact which requires developing nations to cut subsidies and lower tariff barriers, among other standard liberalizing moves. He acknowledges, however, the intensely conflictive nature

of the debate over capitalism, even after the collapse of a viable alternative. In particular, he draws attention to the 1999 IMF and WTO riots and the plummeting sympathy in Latin America for the free market and privatization (de Soto 2000, 2-3). It is interesting, if there is indeed no alternative, that plenty of people are still willing to fight the "inevitable." Despite this resistance, the TINA narrative was recognized as common sense to an extent that allowed Milton Friedman, in the same year as the riots, to dismiss the malcontents of modern capitalism as a "Noah's ark of flat-earth advocates, protectionist trade unions and yuppies looking for their 1960's fix" (Chodor 2015, 63). They might complain, but they lacked credibility.

The results of this global common-sense economic liberalism have been mixed, with booming economies alternating with periods of stalled growth, punctuated by periodic financial crises and economic collapses. The criticisms from the left have poured in, as inequality and Latin America's oddly lagging growth were blamed on the doctrines of the Chicago school of economics and the "neoliberal agenda" in general—see, for examples, the work of Tom Chodor (2015) and David Harvey (2007) in particular. Liberation theologians have likewise continued to criticize unbridled capitalism, and to bring their uniquely religious perspective to bear on the matter; they treat the dominance of the market, the rule of profit maximization, and the emphasis on wealth accumulation as idols and false gods which demand human sacrifices. The problem, Petrella argues, is that they have failed to present alternatives to these idols:

> If the idol is the only available option it is not really an idol, but becomes necessary: it becomes a god. To show the idol as idol, alternatives are needed. Criteria must be able to distinguish between viable options. A key problem, therefore, lies in the lack of viable options. (Petrella 2006, 11)

Under this view, liberation theology's continued insistence on treating capitalism as an undefeatable monolith has prematurely foreclosed alternatives and in doing so has implicitly reinforced capitalism's dominance (Petrella 2006, 73; 77). With the abandonment of historical projects, liberation theology has trapped itself within a system that it condemns and is apparently unable to envision a way out. It has conceptualized capitalism as a great and crushing weight, destroying the lives of people and communities, and then declined to provide itself with a lever to move that weight. This, at least, is Petrella's interpretation.

There are a few things I want to query here, in anticipation of the argument in the following chapter. The first is whether historical projects are legitimately central to liberation theology, or whether they are merely contingent, useful tools in pursuit of the real focus, which is liberation and justice. The second is whether liberation theology, since it is, as I have argued, truly theology, not moralistic social science, should be responsible for generating alternatives to unbridled global capitalism. I will argue later that these alternatives already exist, and have always existed. They need to be chosen and defended, not created. The third and final question—which will be the main focus of the last chapter—is whether liberation theology as practiced today does indeed lack practical content, analytical sharpness and a positive vision of how liberation should be pursued.

CHAPTER 4: CRITICISM AND VISION

Liberation theology is clearly no longer focused on the use of historical projects as a driving force leading to positive change and actual liberation. For better or for worse, it has spent the last several decades taking an increasingly "formally theological" approach towards issues of justice and liberation, making its peace with the Vatican and shedding its allegiance to "real socialism." This is not necessarily bad—as the Boffs note as early as 1986, "Any original theological vision tends, with the passage of time and through its own internal logic, to seek more formal expression," as part of its maturation (Boff and Boff 1986, 72). This formalization process has, however, seemingly eliminated a central role for historical projects. I will argue that this shift away from historical projects does not—despite Petrella's arguments to the contrary—empty liberation theology of all practical applications or strip its concepts of concrete content.

Petrella has three main concerns about the fate of liberation theology without historical projects. First, he thinks its vocabulary will become ambiguous and open to cooption by its opponents—that it will be left with nothing concrete to say. Second, he worries that it will be left without a useful critique of capitalism, that without the mediating vocabulary of a historical project its criticism will lack analytical subtlety and precision. Finally, Petrella thinks that liberation theology is left without a constructive element, that it can only attack what already exists without presenting a concrete and actionable vision of how things might be different.

This chapter will argue that liberation theology can and does achieve the three positive goals implied by Petrella's concerns, and does so without the aid of historical projects. These goals are a meaningful vocabulary, relevant criticism of economic systems, and a constructive approach to a just society, that is, clear steps to be taken in

pursuit of liberation. My own analysis of liberation theology centers not on historical projects, but on the interaction between the deeply ethical-religious focus of liberation theology and its ongoing commitment to and contact with a specific people, their lives and their concerns.

Ambiguity and Lived Experience

Petrella's first objection—that liberation theology's vocabulary lacks concrete content, and can coopted by the Vatican and the IMF (Petrella 2006, ix; 8)—is perhaps the hardest to answer. He writes:

> Today liberation theology is characterized by a minor theological victory and an almost complete political defeat. If imitation is the sincerest form of flattery, then the cooption of liberation theology's terminology is a tribute to its impact within theology and beyond; even the IMF and the Vatican espouse the preferential option for the poor, liberation and the reign of God. (121)

Under this view, liberation theology has been "coopted," by both the Vatican and the IMF, and as such has lost its usefulness and authentic commitment to liberation. Its terms have been emptied of specific meaning and can now be used by its opponents in quite different circumstances.

There is undoubtedly a tendency for different groups to pick up the same terms and use them in confusing, subtly different ways. Though I want to query Petrella's assumption that the Vatican and the IMF are unable to use the terms "liberation" or "the Reign of God" in a genuinely liberationist sense, there is clearly some need to ground the liberationist vocabulary—to give it content and specificity. Without that grounding, Michael Camdessus can and does use liberationist terms in a non-liberationist way in his speech to Christian businessmen at the IMF (Petrella 2006, 8). He continues:

> …we are part of this grace of God, we who are in charge of the economy (the administrators of a part of it in any case): the alleviation of suffering for our

> brothers and the procurers of the expansion of their liberty. It is we who have received the Word. This Word can change everything. We know that God is with us in the work of spreading brotherhood. (Petrella 2006, 9)

This is a bit grandiose, but not all bad. It is, of course, important for business leaders to share in the process of alleviating the suffering of the poor. The problem with this speech, from a liberationist standpoint, is that it displaces one of the key points of liberation theology. The poor must be the agents of their own liberation. We may assist them, but we cannot in fact liberate them—to attempt their liberation without their active participation is paternalism.

The expectation that the poor should be the driving force behind their own liberation and the concomitant prohibition on paternalism are not, however, dependent on liberation theology's commitment to historical projects. Rather, this orientation is a product of a much wider principle within liberation theology: the insistence that liberation theology is impossible without contact with the poor and a deep respect for their worldview and agency. The Boffs remind us that life with the poor is the indispensable precondition to liberation theology:

> Without a minimum of "suffering with" this suffering that affects the great majority of the human race, liberation theology can neither exist nor be understood. Underlying liberation theology is a prophetic and comradely commitment to the life, cause and struggle of these millions of debased and marginalized human beings, a commitment to end this historical-social inequality. (Boff and Boff 1987, 3).

The poor cannot be abstract entities, but must be our neighbors—even ourselves, in the case of the call to solidarity—for our commitment to them to make sense and be useful. The Boffs expand on how that commitment must work in practice:

> Of course the most appropriate and specific way for theologians to commit themselves to the poor and oppressed is to produce good theology. But what we

> want to stress here is that this is impossible without at least some contact with the world of the oppressed. (Boff and Boff1987, 23).

It is this contact that defines and specifies liberation theology's existence, its methods and its goals.

I want to suggest that this orientation, while leaving a certain amount of ambiguity and possibility for contextual (rather than universal) specification of terms, can provide a simple but effective heuristic for whether liberationist terms are being used in a genuinely liberating way. We must, Gutiérrez insists, "evaluate social and economic activity 'from the standpoint of the poor'" (Gutiérrez and Müller 2015, 104). Hard and fast verbal definitions are not necessary. To the bleeding mother with starving children who the Boffs describe in the opening pages of *Introducing Liberation Theology* (Boff and Boff 1987, 1-2), the meaning of liberation is unambiguous. She will know it when she sees it. For liberation theology, the proper meaning of its vocabulary is defined by the experiences of a starving mother in Brazil, or a slum worker in Chile, or peasant in Peru. If the idea of liberation that is drawn up in padded offices in Geneva or New York would be recognizable as liberation to the poor of Latin America, then it is genuine liberation. If not, it is not.

The Ethical-Religious Center of Liberation Theology

Liberation theology today is first and foremost a reflection on God—as Gutiérrez has emphasized in various places—but from that reflection flows a set of religiously-grounded claims about what society should be like and how people should be treated. Without this central ethical aspect, some of liberation theology's key insights lack meaning. The Boffs write that "The religious dimension is certainly essential to liberation for it to be integral…a liberation that didn't involve this religious aspect, or worse, that

repressed it, would become antihuman and enslaving" (Boff and Boff 1984, 110). For instance, the bond between salvation (in the broad sense) and liberation (in the immediate historical sense) is puzzling without a vision of the ethical demands salvation history places on human history. Political systems have to answer criteria of justice and moral goodness, not just efficacy. Clodovis Boff writes:

> The correspondence between salvation and liberation is of an ethical nature. It's not actually political. It's not "good politics" that makes the kingdom come, *it's politics that's morally good, politics that's just*....It's only when human beings win advancement and dignity—even if they perish in the effort—that there's a step forward in the direction of the kingdom. (Boff and Boff 1984, 88-89, emphasis added)

Liberation theology, write the Boffs, "is essentially practical" and therefore "has an immediate bearing on human ethics and attitudes" (Boff and Boff 1984, 62). The movement's ethical implications are crucial to its mission, to the practice of liberation, and to the vision of a just and liberated society at which it aims.

By putting historical projects at the center of his interpretation of liberation theology, Petrella places the emphasis on liberation theology's means, not its ends, creating a flattened and foreshortened vision of the movement without sufficient emphasis on the deeply ethical-religious driving force behind it. This is not to say that the means of liberation are unimportant—it is a famous truism that "he who wills the ends, wills the means"—but these means are, as even Petrella recognizes, historically determined and contingent, while the goals of liberation and a just society are fixed. These goals, which are consistent throughout the movement and condition its choice of means, are based on an ethical vision of the world and a religiously shaped conception of justice. It is this ethical vision which orients liberation theology's critique of unbridled

capitalism and exploitive social and economic systems in general, and which inspires its constructive suggestions for pursuing liberation.

The Critique of Unbridled Capitalism

In this section, I argue that liberation theologians still can and do produce a trenchant critique of the evils of unbridled capitalism, but that they do this not through historical projects, or even primarily through social-scientific analysis, but through the lens of the ethical-religious worldview which centers liberation theology. That the liberationists' critique of existing economic systems is primarily ethical, not functional, seems clear when we consider how liberation theologians talk about their project. There is, first of all, the choice of language. Gutiérrez (1988, xiv) notes that the choice of the term "liberation" in place of the more common and less morally-charged word "development" was an intentional move, intended to highlight the idea that the poor are not poor by mistake or through natural causes, but rather are oppressed and exploited. The concept of social sin—rather than, say, inefficiency, or asymmetrical power relations, or systemic inequality—plays a similar role. This is only fitting for a movement which, in Gutiérrez's words, faces "an ethical question, in the broadest sense of the term," and which strives to reintroduce the language of justice and morality to an increasingly amoral economic sphere (Gutiérrez and Müller 2015, 48, 50).

The liberationist challenge is, as I have said before, that the capitalist system dominating much of the international financial world at the moment is morally wrong. The Boffs write that "the first reaction of Christian faith in the face of this reality is protest. This cannot be! This is not pleasing to God!" (Boff and Boff 1984, 3). The

liberation theologians in general, writes John Pottenger, see poverty and inequality as the inevitable products of unbridled capitalism, and respond with "moral outrage:"

> Their religious sensibilities have been violated and they feel some ethical response is necessary for matters of conscience. They have come to see that the primary flaw in the modern era was the failure on the part of scientific, technological, and economic development strategies to include a critical, normative aspect to their work above that of individualist ethics. (Pottenger 1989, 33)

The moral outrage, and the call for "a critical, normative aspect" in approaches to poverty, comes before any proposed concrete solution. Liberation theology asks, in Gutiérrez's words, "Does ethics, and very concretely, Christian ethics, have anything to say to the economic world?" and decides that it undeniably does (Gutiérrez and Müller 2015, 97). He adds that this question would have hardly made sense in earlier centuries, when the response would have been an unhesitating affirmative (Gutiérrez and Müller 2015, 97). As Casadaliga and Vigil (1994, 175) write, "If God is among the cooking pots, as St. Teresa said, he is also among the trade unions, the political parties, and the demands of the poor," and where God is, the Church and the theologians must follow. Gutiérrez (Gutiérrez and Müller 2015, 3) adds, "No dimension of human experience—which itself is lived in the midst of complex social situations—escapes the condition of being a disciple of Jesus." The good news—and therefore Christian ethics—is all embracing.

In deciding that it can speak to the morality of economic issues, liberation theology is not particularly radical; this is something that the Church has long considered itself entitled to do, from offering a defense of trade unions to condemning usury (see *Rerum novarum* and *Vix pervenit* respectively) and beyond. The theological critique of the modern capitalist paradigm is, however, particularly biting:

> …the modern economy challenges commonly accepted moral norms and not only in circles we might call traditional. Envy, selfishness, and greed become the driving forces of the economy; solidarity and concern for the poorest are seen, by contrast, as obstacles to economic growth and in the end as counterproductive in achieving a situation of well-being from which all persons might benefit one day. (Gutiérrez and Müller 2015, 97-98)

The critique is not only that capitalism produces unacceptable outcomes in terms of poverty and limited agency, but also that it inverts the moral universe. It makes into vices what were once virtues, and praises the old vices as rational and useful forces of growth and change. There is, in this, a parallel to the liberationist claim that unbridled capitalism is in fact a form of idolatry, the idolatry of the market. The moral universe should be oriented towards a God of life, but it is now oriented towards a false god of profit maximization. One condemns as sin what the other praises as essential.

Poverty and Death

The liberationist critique of immoral economies—including but not limited to unbridled capitalism—begins with a unique understanding of poverty, its causes and its implications. Poverty is understood as the common denominator among the powerless of the world. The Boffs write that "There is one over-arching characteristic of the oppressed in the Third World: they are poor in socio-economic terms. They are the dispossessed masses on the peripheries of cities and in rural areas," and so poverty becomes the main focus for liberation theologians (Boff and Boff 1987, 25). This poverty is, as the liberationists write repeatedly, dehumanizing, undignified, and contrary to God's will for his people.

Liberation theologians then inquire into the sources of this dehumanizing and ever present poverty, and find not neutral causes but structures of sinfulness which perpetuate violence against the poor and marginalized. The Boffs write in *Introducing Liberation*

Theology that there are three main explanations for the sources of poverty, which they call the empirical explanation, the functional explanation, and the dialectical explanation (Boff and Boff 1987, 26). They reject the (oddly named) empirical explanation, which sees poverty as rooted in vice and proposes more aid as the solution. Likewise, they reject the functionalist explanation—espoused by de Soto and many modern economists—which sees poverty as backwardness, and proposes development and reform as the solution. This second approach has some merits, the Boffs note; it successfully treats poverty as a collective issue, not just as the result of individual decisions. Ultimately, this too is rejected because it "fails to see poverty as *conflictive*. In other words, it fails to see what Puebla saw, that poverty 'is not a passing phase…It is the product of economic, social, and political situations and structures…where the rich get richer at the expense of the poor, who get even poorer'' (Boff and Boff 1987,s 26). This vision of poverty as conflictive—as caused by oppression—is the unique contribution of the dialectical explanation.

It is the dialectical explanation, of course, which the Boffs and liberation theologians in general endorse as the most realistic picture. Under this view, poverty is not neutral happenstance but is rather "the product of the economic organization of society itself, which exploits some—the workers—and excludes others from the production process—the underemployed, unemployed, and all those marginalized in one way or another" (Boff and Boff 1987, 26). Poverty is, in short, the product of injustice. It is not simply unfortunate or lamentable; the economic system which produces such poverty is morally wrong. The only way out of this situation, argue the Boffs, is through revolution, which is "understood as the transformation of the bases of the economic and

social system," that is, as ground-up systemic change, not necessarily as violent revolt (Boff and Boff 1987, 27).

In this discussion of poverty as oppression, however, it is important not to lose sight of one of the fundamental themes of liberation theology, that the poor must serve as agents of their own liberation. The emphasis on oppression cannot reduce the poor to passive victims of a degrading economic system:

> The situation of the oppressed is defined not only by their oppressors but also by the way in which they react to oppression, resist it, and fight to set themselves free from it. The poor cannot be understood without including their dimension as social subjects or co-agents—though submerged ones—of the historical process. (Boff and Boff 1987, 27)

This emphasis on the work of the poor in their own liberation is, as mentioned previously, a necessary safeguard against paternalism. Likewise, it counteracts the tendency of the dominant economic system to deny the poor their human agency and dignity.

That this system must change—that it is morally required that Christians seek Boff's "revolution"—is emphasized by the final aspect of the liberationists' interpretation of poverty, which is that poverty in the end means death. The Boffs (1987, 48) write that to be poor means to be "lacking the means to sustain life," at least with any certainty. Gutiérrez (1988, xxi) agrees, writing that "poverty means death: lack of food and housing, the inability to attend properly to health and education needs, the exploitation of workers, permanent unemployment, the lack of respect for one's human dignity, and unjust limitations placed on personal freedom in the areas of self-expression, politics and religion." It is a theme he returns to many times (Gutiérrez 1988, 164; Gutiérrez and Müller, 105). To be unmoved, to do anything but struggle against the sources of this

poverty, would fail to give human life its due value, as commanded by God. To neglect the poor is to neglect the command, “Thou shalt not kill,” or even its more specific form, “Thou shalt not murder,” for to murder is to kill unjustly.

This interpretation of poverty is the source of the preferential option for the poor, as it is understood in liberationist terms. The poor are not, as is sometimes thought, lauded for their poverty, simplicity, and dependence on God—this is not why he “prefers” them. Rather, the poor “are preferred by God and by Christ not because they are good, but because they are poor and wronged. God does not will the poverty they suffer,” and it is offensive to a God of justice that they should suffer in this way (Boff and Boff 1987, 48). He “prefers” them in the sense that he is on their side; they are the victims and he is the judge ordering reparations. Likewise, because of their vulnerability, “the claims of the poor and marginalized and of those whose rights have been denied” have special priority (Gutiérrez and Müller 2015, 104). The treatment of the poor in society—the fate of “the least of these”—is, Gutiérrez notes, “a criterion for deciding whether justice exists in a society” (Gutiérrez and Müller 2015, 104). It is a criterion that leaves most modern capitalist societies roundly condemned, at least in the eyes of the liberation theologians.

The Dehumanizing Economy

In addition to attacking an economy which systematically produces and entrenches poverty, liberation theology attacks what it sees as the dehumanizing elements of economic liberalism: the tendency to prioritize economic imperatives over legitimate human needs. At the same time, liberation theology addresses itself to those who are excluded from the contemporary economy, who have been stripped of their agency and treated as non-humans. Marginalized people are killed by their poverty, but poverty also

dehumanizes them so that their death is not acknowledged or mourned. Gutiérrez (1988, 164) makes this connection explicit, writing that "concretely, to be poor means to die of hunger, to be illiterate, to be exploited by others, *not to know that you are being exploited, not to know that you are a person*," (emphasis added), in other words, that it is not only life but a sense of personhood that is attacked by poverty. The poorest of the poor are, in the eyes of the economy, "non-humans" and their deaths are practically invisible (Gutiérrez and Müller 2015, 101).

The accusation that the modern capitalist economy prioritizes economic gain over human needs is essentially a reprise of the familiar theme of market idolatry. This dehumanizing economy "tends to convert everything, including persons, into merchandise," into goods to be bought and sold on the market (Gutiérrez and Müller 2015, 49). This is "the contemporary form of worshipping mammon" to which is added "the idolatry of power, ignoring all human rights" (Gutiérrez and Müller 2015, 118). The gods of the market, as Hinkelammert and others argue, effectively demand human lives in return for continued growth. Petrella (2006, 10), describing and developing this position, writes that "The extension of capitalism's law of profitability requires the increasing poverty of the great majority of humankind; capitalism requires human sacrifices to flourish" and eventually becomes self-cannibalizing. The "idolatrous elements" of unbridled capitalism, are "lodged in the fact of, and in the justifications of, the primacy of profit and the absolute character of the market" (Gutiérrez and Müller 2015, 101). Profit maximization, not human safety and dignity, becomes the final consideration for economic actors in this system. An attempt to place human dignity back at the center of the decision-making process is seen as "counterproductive" and "archaic"

(Gutiérrez and Müller 2015, 126). The failure to treat human dignity as central is, to the liberationists, morally wrong. People are God's image-bearers, and their needs as humans—not as *homo economicus*, economic man, but as *humans*—must come first.

Exclusion

In the eyes of the liberationists, unbridled capitalism not only substitutes market imperatives for human needs and human dignity, but it also excludes the poor from society and limits their access to the political and economic arena. The poor are not just oppressed—they are ignored. In the world today, Gutiérrez writes, "the poor are anonymous and seem destined for even greater anonymity. They are born and die without being noticed. They are disposable pieces in a history that eludes their grasp and excludes them" (Gutiérrez and Müller 2015, 101). Liberation theology, then, demands that these people be noticed and reincorporated into society. It responds to the marginalized and excluded: "Liberation theology's challenge, famously expressed by Gustavo Gutiérrez, comes from the non-person or the non-human, the human being who is not recognized as such by the prevailing social order" and announces unacceptability of this situation (Petrella 2006, 17). Poverty is already "a scandalous condition inimical to human dignity and therefore contrary to the will of God" but excluding the poorest people from the economy—and, through de facto disenfranchisement, from politics—denies not only their human dignity, but, in effect, their existence (Gutiérrez 1988, 165).

This is a double exclusion, from both politics and the economy. Economic exclusion has been exacerbated in recent decades, Gutiérrez thinks, by the increasing integration and complexity of the global economy, which makes people's access to work and to improved living conditions contingent on their possessing certain kinds of

technical skill sets (Gutiérrez and Müller 2015, 103). The poor lack these marketable skills and also the means to gain these skills. They are excluded not only from the economy but from the training and education necessary to enter the economy. It is also worth noting the growing role of the informal economy in Latin America, a phenomena that de Soto has documented is his book *The Other Path* (2002). These workers, excluded from the formal economy by a variety of barriers, lack the protections, benefits and stable wages of formal-sector workers. Like Gutiérrez's unskilled peasants, they often lack the means to join the global economy.

This economic exclusion is exacerbated by systems of political and cultural exclusion, related to the complicated history of democracy and colonialism in Latin America (Gutiérrez and Müller 2015, 104). Democracy has, as I noted in the first chapter, a long history in the hemisphere, but it is often incomplete and partial, with little or no representation of the popular classes. It is, as Reid (2007, 27-28) ironically calls it, a system of oligarchic democracies. Petrella's (2006, 46) analysis of the situation is similar; there is little true democracy in Latin America, if we take democracy to involve the meaningful inclusion of the popular classes in the political process. In a system in which representation is incomplete and power tightly controlled by wealthy elites, it is unsurprising that peasants, workers in the informal economy and those excluded from the growth and benefits of globalization would have little political agency, and often little voice. Economic inequality means, effectively, political inequality; the poor are excluded not only from the economy, but also from the political arena in which they might address these issues.

Criteria for Positive Change

The negative critique of unbridled capitalism and the dominant political and economic systems of today is based, as I have argued, on a set of ethical and religious norms. Liberation theology does have an alternative vision of how the world should work, and some concrete notions of the steps which must be taken to make that vision a reality and the standards which must be met for any society to qualify as just .The key concepts in this positive vision do lack, as Petrella would point out, a "definite institutional content," but that lack is, I think, appropriate. By refusing to specify the exact mechanisms (progressive taxation, social security, governmental structure) by which human society is to grow more just—by which it grows towards the Reign of God—liberation theology both avoids hubris and allows its ideas a certain adaptability. The concrete, historical and sociopolitical details of the situation in a given time and place should specify the institutional content of the pursuit of justice. This historical contextualization is itself deeply typical of liberation theology.

That is not to say, however, that liberation theology lacks guiding mandates for what a more just society would look like. These mandates, while general enough to be applicable to a wide range of situations, remain specific enough to provide concrete guidance. Three of these main ideas stand out as particularly distinctive: the idea of the universal destination of the goods of the earth, the insistence on inclusive democracy with a social-egalitarian dimension, and the goal of Christian solidarity with the poor. All of these ideas are deeply countercultural; all stand in sharp contrast to basic liberal and individualistic norms.

Property and the Universal Destination of Goods

The idea of the universal destination of the earth's goods is ancient, with roots in patristic Christianity. It has been revived to some extent by 20th century church social teaching, and plays a major role in liberation theology's understanding of property and the rights of the poor. The basic idea behind the universal destination of goods is that all property is God's; human ownership is not absolute but contingent, almost like a divine loan.

José Porfirio Miranda draws a distinction between the right to private property as defended by papal encyclicals and the same right as traditionally understood by the liberal economic tradition. The Catholic understanding of "the right of ownership," he argues, has its roots in Thomas Aquinas and implies the right to "care for and distribute" the goods of the earth (Miranda 1974, 1). This is the teaching of contemporary papal encyclicals as well as medieval and patristic sources, and can be contrasted with the liberal understanding of ownership as "the ability to use and even destroy something," a right which excludes the possibility of others having a similar right to that same thing (Miranda 1974, 1). This absolute right of ownership is denied by the encyclicals *Mater et Magistra* and *Populorum progressio*, which "place the right of all men to *use* the goods of the earth for their sustenance prior to the right of ownership" (Mirand 1974, 2). On this basis, Miranda considers himself justified in arguing for the abolition of "differentiated" —that is, exclusive—private property in general (Miranda 1974, 10-12).

Not all liberation theologians go quite so far; Gutiérrez at least seems comfortable with a more traditional understanding of private property, at least for small holders. He does, however, makes the possibility of private property contingent on the overarching

reality of the “the universal purpose of the goods of the earth” (Gutiérrez and Müller 2015, 127). He writes:

> Today more than ever it is appropriate to recall that God has given the entire human race what is needed for its livelihood. The goods of this world do not belong exclusively to certain persons or social groups….They belong to all. *Only within this framework can we accept the private appropriations of what is required for existence and of what is desirable for a better social order.* (Gutiérrez and Müller 2015, 127, emphasis added)

This is a partial and circumscribed version of a right to property, subordinated to the right to life. In liberation theology there is no absolute right to property, as there often is in liberalism and the Enlightenment rights tradition. The right to life is, for the liberationists, paramount, and includes the right to the means of subsistence. It therefore overrules mere property rights, as commonly conceived.

Liberation theologians—especially Miranda, with his interest in property systems in the Bible and the early church—follow the church fathers in treating property as being for everyone’s use and wellbeing. Under this view, “charity” is not giving out of private abundance, but rather returning to the poor what is already theirs. Miranda quotes Ambrose, saying, “You are not making a gift of your possessions to the poor person. *You are handing over to him what is his*” and “God willed that this earth should be the common possession of all and he offered its fruits to all. But avarice distributed the rights of possession” (Miranda 1974, 16, emphasis in Miranda). Likewise, he quotes Augustine’s comment that “assisting the needy is justice” (Miranda 1974, 16). In liberation theology, then, giving is not an act of generosity so much as an act of justice.

A just society, for liberation theologians, would therefore include the widespread recognition of the universal purpose of earth’s goods, and a rejection of conceptions of property rights that exclude others from the means of life. This need not be a wholesale

prohibition on private property, but it should involve strict limiting conditions on what is, in the western liberal tradition, generally absolute. This also involves an affirmation, on a societal level, that redistributive programs are not acts of charity or generosity, not robbing the rich to feed the poor, but rather are restoring to the poor what was already theirs through the generosity of the Lord. That this is a radical, counter-cultural and unpopular position is clear. It is, however, a logical extension of liberation theology's approach to poverty, property, and the value of human life.

Inclusive Democracy

The second criteria for positive change is focused on empowering the poor through government and including the popular classes in the process of political decision making. Liberation theologians reject the modern, purely procedural interpretation of democracy often associated with Joseph Schumpeter. These modern interpretations often neglect Schumpeter's insistence that certain political and social preconditions are necessary for democracy (Petrella 2006, 51). Without these preconditions, democracy cannot effectively function even in the limited sense of democracy as frequent, fair and competitive elections of political decision makers. The Third Wave of democratization which brought about the return of democratic (as opposed to military) regimes in Latin America was imperfect; "In reality, neither Schumpeter's social conditions nor his political conditions are met" (Petrella 2006, 51). Latin America must first pursue the tolerance, political stability, economic development and relative equality which has made procedural democracy viable in the developed world. This leads Petrella—and liberation theologians in general—towards a more substantive definition of democracy.

This active, inclusive democracy pays attention to the social and economic foundations of society, as well as to the competiveness of elections and the breadth of the electorate. For liberation theology, democracy must include elements of inclusion and social concern, if it is not to become yet another means of entrenching the status quo of oppression; Petrella notes that "liberation theology has consistently opposed the reduction of democracy to a political method for choosing leaders independent of society's social condition," because democracy as a *process* is not seen as a worthy end in itself (Petrella 2006, 52). Liberation is the goal, and democracy that does not advance that goal is worse than useless, since it gives lip service to freedom while actually supporting oppression.

Democracy was, at first, viewed with suspicion by the liberation theologians; it was a democracy of the few, which failed to empower the underclasses (Petrella 2006, 52). Petrella quotes José Miguez Bonino on the limitations of "oligarchic" democracy:

> A free press, free trade, education, politics – all the 'achievements' of liberalism – were the privilege of the elite. For the growing Latin American masses, undernourishment, slavery, illiteracy, and later on forced migration, unemployment, exploitation, crowding and finally repression when they claim their rights – these are the harvest of one century of 'liberal democracy.' (Petrella 2006, 53)

This is harsh criticism of one of the most valued institutions in the West, from people on the margins of the international community who felt that it failed to serve them or even made their lives worse. From the liberationist perspective, a viable democracy must involve "a process of incorporation for excluded segments of the population" (Petrella 2006, 56). A purely formal democracy need not bother with this kind of incorporation.

The liberationists did not, however, give up on democracy; instead, they sketched a vision in which the purely procedural aspect of democracy would be only a first step on

the way to a radical, participatory and inclusive democracy. For Boff, this participatory democracy should:

> ….transcend the limits of bourgeois representative democracy which in Latin America functions in an elitist and anti-popular way…. Participatory democracy is based on the organized people; it can and must have representation, but this is continually controlled by the popular organizations themselves, the true subjects of social power. This participatory democracy is not just a project. The seed of it is alive in the popular movements, in the Christian communities on the ground and other movements. (Petrella 2006, 60)

In these remarks, the broad-based, social nature of this vision of democracy is clear. Social institutions, like the voluntary organizations lauded in *Rerum Novarum*, have a special role to play here, and the CEB's in particular—here mentioned as the "Christian communities on the ground"—played an important role in the liberationist reimagining of democracy (Petrella 2006, 58-59), though their historical role has diminished significantly in recent time (Petrella 2006, 60-61). The vision of a truly participatory government is the closest thing contemporary liberation theologians have to a historical project or a concrete alternative to capitalism. Boff writes that "Participatory democracy represents the new…alternative to the capitalist social mould," an alternative which would help counteract the political and economic exclusion which the poor currently face (Petrella 2006, 60).

Solidarity

Liberation theology's final response to poverty—and perhaps, from the standpoint of modern economics, its most radical and most irrational response—is the idea of evangelical poverty, or poverty as solidarity. This option suggests that Christians are, for the sake of the poor, called to participate in their poverty voluntarily, not just to live among the poor but to live as the poor. Poverty is not, in this light, romanticized as the

Church has sometimes been tempted to romanticize it. It is not the voluntary poverty-as-simplicity of the old religious orders. It is, rather, poverty-as-protest (Gutiérrez and Müller 2015, 88). Gutiérrez writes:

> Christian poverty has meaning only as a commitment of solidarity with the poor, with those who suffer misery and injustice...It is not a question of idealizing poverty, but rather of taking it on as it is—as an evil—to protest against it and to struggle to abolish it....Christian poverty, an expression of love, is solidarity with the poor and is a protest against poverty. This is the concrete, contemporary meaning of the witness of poverty. (Gutiérrez and Müller 2015, 172)

The people of God are called upon to take up the poverty of their neighbors as a burden, in recognition of its evils, in protest and through love. Through this missional poverty, they labor not *for* but *with* the suffering and marginalized people of the earth. Through this voluntary poverty, the pursuit of liberation becomes more urgent and more authentic, free of the dangers both of paternalism and of apathy.

This idea of solidarity—of identification with the poor, and of identifying the poor as God's beloved—is the very heart and soul of liberationist practice. Solidarity has a broader meaning than individual voluntary poverty, but it does require at a minimum frequent contact with the poor and oppressed and practical identification with their needs and concerns. It is, in the root sense, compassion: *com-passion*, or suffering-with (Boff and Boff 1987, 2-3). It is from this practice of solidarity that liberation theology first sprung—from the work of Gutiérrez and the Boffs, and other men and women of faith living and working with the poor, faced with their concerns and their realities on a daily basis. This is why the Boffs are, as I noted earlier, so insistent on the importance of contact with the lives of the poor for the process of liberation theology (Boff and Boff 1987, 2-3). Solidarity also has implications for the whole church. "It's not a matter of personal acts alone," writes Gutiérrez, but rather "solidarity is required of the entire

social aggregation and signifies a commitment of the entire church," a commitment to being the church of and for the poor (Gutiérrez and Müller 2015, 125).

Judging Alternatives

I suggested earlier that liberation theology should not be responsible for generating alternatives to unbridled capitalism, but rather that those alternatives already exist. What is needed is a way to judge and choose between alternatives, and a framework for defending and endorsing those choices. That these alternatives do exist I take as fairly evident. There are, of course, the "soft socialist" states of Europe, the "Scandinavian exception," the participatory and proportional democracy of Switzerland, the old Keynesian or third-way economies of Europe and North America (which worked well for a time, and under the right circumstances may do so again), the state-led development of the newly industrialized countries in Asia (Chodor 2015, 57-58), the traditionally inclusive ownership and land rights systems in Africa (Cousins 2007, 281-283) and the reciprocity systems of Latin American indigenous peoples which have inspired Gutiérrez (Petrella 2006, 5). There are any number of existing systems with different ways of approaching issues of poverty and inclusion; there are still more systems which have yet to be tried, ones which would incorporate bits and pieces of existing models blended with new insights. Liberation theology cannot, certainly, be responsible for developing, creating and testing governance systems.

What liberation theology can do is supply ethical criteria for choosing among already existing or potentially existing options, in much the way that liberalism has traditionally supplied ethical criteria for judging existing systems. Liberation theology can also defend the options it endorses on moral grounds, just as liberalism defends the

endorsement of free-market capitalism. Obviously, the criteria provided by these two world visions—Western economic and political liberalism and Third World liberation theology—are dramatically different and at times diametrically opposed. I am not arguing that they are similar, but rather that they can play an analogous role in judging the moral permissibility of existing systems.

The controlling criterion for liberalism is the freedom of the individual, understood generally as freedom from certain kinds of societal and governmental interference. Freedom is, for Friedman (2002, 12), an ethical issue, but not an all-embracing one. Freedom is a strictly procedural issue, under his view, and a liberal society "has nothing to say about what an individual does with his freedom." The individual should be free to choose his own path—and this is as true of economic decisions as it is of political ones (Freedman 2002, 8-9). Milton Friedman (2002, 12) writes, "As liberals, we take freedom of the individual, or perhaps the family, as our ultimate goal in judging social arrangements," and these social arrangements stand vindicated or condemned by how well they conform to this idea of freedom.

Liberation theology's criteria for a morally just society are, unlike the classically liberal equivalent with its procedural focus, unabashedly substantive. These criteria include things like equality, inclusive and participatory democracy, and robust attempts to alleviate the sufferings of popular classes—the criteria for positive change discussed in the last section. The primary category for judging a society, however, is the way that the poor are treated. Gutiérrez quotes the American bishops, saying that "if society is to provide justice for all, we must recognize the priority of the claims of the marginalized and of those whose rights have been denied," and adding in his own voice, "how the

weakest are effected is a criterion for deciding whether justice exists in a society" (Gutiérrez and Müller 2015, 104). If this sounds like John Rawls, it is for a good reason: in a footnote, Gutiérrez recognizes the similarity to the second of Rawls's two principles of justice. The debt to Rawls is limited, however; "A Theory of Justice" postdates the birth of liberation theology by several years. This concern for the weakest in society is the recognition of God's preferential care for the poor, an insight "born of the experience and practice of Latin American Christian communities" in the face of great hardship (Gutiérrez and Müller 2015, 7).

The difference in emphasis between these two visions of justice—liberalism and liberation theology—is unsurprising, considering their origins. One springs from the Western Enlightenment and is particularly popular in the developed nations where people are generally prosperous; they may quite legitimately worry about government interference, and the issue of survival has been taken care of. The other springs from a continent still desperately poor and often politically oppressed, which must worry about the basic means of subsistence as well as the threat of violent repression. Oppression becomes one unified whole in this scenario, proceeding from an intermeshed system of unjust governance and exploitive economics. In this context there is no possibility of a tidy division between politics and economics, so the solution is conceptualized as a change in economic systems, economic policies, and governmental quality, these items all being tightly interwoven. I do not want to argue here that the liberationist perspective is superior, only that it is different and contains important insights. We need not accept, but must at least take seriously, this outsiders' critique of the liberal paradigm which dominates the developed world.

CONCLUSION

Liberation theology is, as I have remarked on a number of occasions, still a very young theology. It has evolved significantly since its birth, a fact which is sometimes overlooked or minimized both by the theologians themselves and by their commentators. I am grateful to Ivan Petrella, however much I may disagree with his interpretive lens, for illuminating and codifying those changes.

As much as it has evolved, however—and as much as it may be changing still—the theology of liberation has, as I have argued, preserved at its core a number of striking insights into the human social condition, and into what it means to be committed to our fellow humans in the face of extreme and degrading poverty. These insights include many of the central terms discussed in the second chapter: the preferential option for the poor, the insistence on integral liberation, the warning against paternalism and the urge to empower the oppressed to be agents of their own liberation stand out as valuable contributions. Likewise, these insights include the critique and constructive vision developed in the last chapter. Some of these insights are challenging to understand or accept from a modern Western perspective; the call for solidarity, voluntary poverty, and the limitations on the right of private ownership are among these challenges. The demand for an egalitarian and inclusive form of social democracy is less radical, but still conflicts with a thorough-going liberal capitalism.

I have argued, however, that the basis for these many particular and partial facets of liberation lies in liberation theology's distinctive vision of a just world. This vision is, I claim, based on the reflection of a religious community on the realities of extreme poverty in the third world. It presents both a normative stance about what the world

should be and an ethical critique of the world as it is. This critique is valuable—to those of us in the developed world as much as to the people of Latin America—for a number of reasons. First, this critique stems from the ethical concerns and reflections of the Latin American church, and in doing so refuses to treat economics as a neutral subject, as the impartial science which it often becomes in the Western academy. Liberation theology emphasizes that there are moral issues at stake in economic decision making, just questions of growth and efficiency. Secondly, it is valuable as a critique from the underside of the international community, from a part of the world which endured the downsides of globalization. It demands a particularistic look at the effects of our dominant global system and gives voice to the local needs of neglected communities. Finally, liberation theology provides an alternative worldview, focused on issues of substantive justice and divine mandate, which is often fundamentally at odds with the modern liberal paradigm. This very combativeness makes it valuable, however. Even the best of systems have their weaknesses, but these weaknesses can become invisible without an alternative vision. Liberation theology is not perfect; it has its own limitations. Nonetheless, its strengths can illuminate the limitations of liberal capitalism and open important conversations about its weaknesses.

I have argued, then, that liberation theology has indeed survived the collapse of global socialism and evolved without losing its characteristic vision or its usefulness. In the process of that evolution it has, at least to some extent, infected the wider church with its priorities and its vocabulary in a way that strengthens the ancient tradition of Catholic social teaching. It has remained focused on its primary intuition, that God has compassion on the poor and is outraged by the degrading circumstances in which they

live. Liberation theology is deeply Catholic and deeply Latin American, rooted in the twin realities of its faith and the lived experience of its people. It has survived a tumultuous fifty years, and its insights remain as fresh and important as ever.

References

Benedict XIV. 1745. *Vix pervenit.* Vatican City: The Vatican. Accessed November 20, 2018. http://www.papalencyclicals.net/ben14/b14vixpe.htm.

Boff, Leonardo, and Clodovis Boff. 1984. *Salvation and Liberation: In Search of a Balance Between Faith and Politics.*Translated by Robert R. Barr. Maryknoll, NY: Orbis Books.

Boff, Leonardo, and Clodovis Boff. 1986. *Liberation Theology: From Dialogue to Confrontation*. Translated by Robert R. Barr. San Francisco: Harper and Row Publishing.

Boff, Leonardo, and Clodovis Boff. 1987. *Introducing Liberation Theology*. Translated by Paul Burns. Maryknoll, NY: Orbis Books.

Casadaliga, Pedro, and José-María Vigil. *Political Holiness*. Translated by Paul Burns and Francis McDonagh. Maryknoll, NY: Orbis Books.

CELAM. 1968. “Poverty and the Church.” Translator unknown. Medellin, Colombia: CELAM. Accessed October 14, 2018. http://www.povertystudies.org/TeachingPages/EDS_PDFs4WEB/Medellin%20Document-%20Poverty%20of%20the%20Church.pdf.

CELAM. 1968. *MEDELLIN (1968)*. Medellin, Colombia: CELAM. Accessed December 31, 2017. http://www.diocese-braga.pt/catequese/sim/biblioteca/publicacoes_online/91/medellin.pdf.

CELAM. 1979. “The Final Document.” In *Puebla and Beyond*, edited by John Eagleson and Phillip Scharper, translated by John Drury, 123-285. Maryknoll, NY: Orbis Books.

Congregation for the Doctrine of the Faith. 1984. *Instruction on Certain Aspects of the "Theology of Liberation."* Vatican City: Vatican Publishing House. Accessed March 6, 2018. http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_19840806_theology-liberation_en.html.

Congregation for the Doctrine of the Faith. 1986. *Instruction on Christian Freedom and Liberation*. Vatican City: Vatican Publishing House. Accessed March 18, 2018. http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_19860322_freedom-liberation_en.html.

Cousins, Ben. 2007. "More Than Socially Embedded: The Distinctive Character of 'Communal Tenure' Regimes in South Africa and its Implications for Land Policy." Journal of Agrarian Change 7, no. 3 (July): 281-315. Accessed November 22, 2018. http://web.b.ebscohost.com.proxy.houghton.edu/ehost/pdfviewer/pdfviewer?vid=11&sid=df5487a9-781a-4b68-94f8-079a55add87a%40sessionmgr102.

Chodor, Tom. 2015. *Neoliberal Hegemony and the Pink Tide in Latin America.* London: Palgrave Macmillan.

De Janvry, Alain, and Elizabeth Sadoulet. 2000. "Growth, Poverty, and Inequality in Latin America: A Causal Analysis, 1970—94." *Review of Income and Wealth* 43, no. 3 (September): 267-287. Accessed November 2, 2018. http://www.roiw.org/2000/267.pdf.

De Soto, Hernando. 2000. *The Mystery of Capital: Why Capitalism Triumphs in the West and Fails Everywhere Else.* New York, NY: Basic Books.

De Soto, Hernando. 2002. *The Other Path: The Economic Answer to Terrorism*. New York, NY: Basic Books. (Orig. pub. 1989).

Fernandez, David. 1999. "Oral History of the Chilean Movement 'Christians for Socialism', 1971-73." *Journal of Contemporary History* 34, no. 2 (April): 283-294. Accessed November 22, 2018. https://www-jstor-org.proxy.houghton.edu/stable/pdf/261220.pdf?refreqid=excelsior%3A79b762ffb8b62b87788891d4aa0ced21.

Friedman, Milton. 2002. *Capitalism and Freedom: Fortieth Anniversary Edition*. Chicago: University of Chicago Press. (Orig. pub. 1962).

Gutiérrez, Gustavo. 1988. *A Theology of Liberation: History, Politics and Salvation*. Translated and edited by Sister Caridad Inda and John Eagleson. Maryknoll, NY: Orbis Books. (Orig. pub. 1973).

Gutiérrez, Gustavo. 1991. *The God of Life*. Translated by Matthew O'Connell. Maryknoll, NY: Orbis Books.

Gutiérrez, Gustavo, and Gerhard Ludwig Müller. 2015. *On The Side of the Poor: The Theology of Liberation.* Translated by Robert A. Krieg and James B. Nickoloff. Maryknoll, NY: Orbis Books.

Haight, Roger. 1985. *An Alternative Vision: An Interpretation of Liberation Theology*. Mahwah, NJ: Paulist Press.

Harvey, David. 2007. *A Brief History of Neoliberalism*. Oxford: Oxford University Publishing. Accessed October 1, 2018. Ebscohost ebook.

Hayek, Friedrich. 1944. *The Road to Serfdom*. Chicago: University of Chicago Press.

Horowitz, Jason. 2017. "Pope Francis Ousts Powerful Conservative Cardinal." *New York Times*. July 1, 2017. Accessed November 22, 2018. https://www.nytimes.com/2017/07/01/world/europe/vatican-pope-doctrine-mueller.html.

John Paul II. 1981. *Laborem exercens.* Vatican City: Vatican Publishing House. Accessed January 9, 2018. http://w2.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_14091981_laborem-exercens.html.

John Paull II. 1987. *Sollicitudo rei socialis.* Vatican City: Vatican Publishing House. Accessed February 1, 2018. http://w2.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_30121987_sollicitudo-rei-socialis.html.

John Paul II. 1991 *Centesimus annus.* Vatican City: Vatican Publishing House. Accessed February 1, 2018. http://w2.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_01051991_centesimus-annus.html.

Kee, Alistair. 2001. "The Conservatism of Liberation Theology: Four Questions for Jon Sobrino." *Political Theology* 2, no. 3 (March): 30-43. Accessed October 15, 2017. http://web.a.ebscohost.com/ehost/pdfviewer/pdfviewer?vid=1&sid=8a620286-cb05-4e8f-b62d-0b0ac3e2d000%40sessionmgr4007.

Leo XIII. 1891. *Rerum novarum.* Vatican City: The Vatican. Accessed January 20, 2018. http://w2.vatican.va/content/leo-xiii/en/encyclicals/documents/hf_l-xiii_enc_15051891_rerum-novarum.html.

Lernoux, Penny. 1979, "The Long Path to Puebla." In *Puebla and Beyond*, edited by John Eagleson and Phillip Scharper, translated by John Drury, 3-27. Maryknoll, NY: Orbis Books.

McClaverty, Peter. 2005. "Socialism and Libertarianism." *Journal of Political Ideologies* 10, no. 2 (June): 185-198. Accessed November 14, 2017. http://web.a.ebscohost.com/ehost/pdfviewer/pdfviewer?vid=4&sid=ea15baa9-5d47-4a6c-a84c-2ba757cf30ef%40sessionmgr4008.

Miranda, José Porfírio. 1974. *Marx and the Bible: A Critique of the Philosophy of Oppression*. Translated by John Eagelson. Maryknoll, NY: Orbis Books.

Nessan, Craig L. 1989. *Orthopraxis or Heresy: The North American Theological Response to Latin American Liberation Theology.* Atlanta, GA: Scholars Press.

Paul VI. 1967. *Populorum progressio.* Vatican City: Vatican Publishing House. Accessed February 4, 2018. http://w2.vatican.va/content/paul-vi/en/encyclicals/documents/hf_p-vi_enc_26031967_populorum.html.

Petrella, Ivan. 2006. *The Future of Liberation Theology: An Argument and Manifesto*. Suffolk, Great Britain: SCM Press. (Orig. pub. 2004).

Pottenger, John R. 1989. *The Political Theory of Liberation Theology: Towards a Reconvergence of Social Values and Social Science*. Albany, NY: State University of New York Press.

Reid, Michael. 2007. *Forgotten Continent*. New Haven, CT: Yale University Press. Accessed October 6, 2018. Kindle ebook.

Rockefeller, Nelson. 1969. *The Rockefeller Report on the Americas: New York Times Edition*. Chicago, IL: Quadrangle Books.

Sayer, Joseph. 2015. “Introduction.” In *On The Side of the Poor: The Theology of Liberation.* Translated by Robert A. Krieg and James B. Nickoloff, vii-xiv. Maryknoll, NY: Orbis Books.

Second Vatican Council. 1965. *Gaudium et spes.* Vatican City: Vatican Publishing House. Accessed February 28, 2018. http://www.vatican.va/archive/hist_councils/ii_vatican_council/documents/vat-ii_const_19651207_gaudium-et-spes_en.html.

Segundo, Juan Luis. “Capitalismo-Socialismo:<<crux theological?>>.” *Concilium*, no. 096 (June). Edition Scribd: 1-11. Accessed April 30, 2018. file:///C:/Users/katherine.stevick19/Downloads/146458884-Segundo-Juan-Luis-Capitalismo-Socialismo-Crux-Theologica-Concilium-096-Junio-1974%20(1).pdf.

Smith, Christian. 1991. *Emergence of Liberation Theology: Radical Religion and Social Movement Theory.* Chicago, IL: University of Chicago Press.

Sobrino, Jon 1979, In *Puebla and Beyond*, edited by John Eagleson and Phillip Scharper, translated by John Drury, 289-309. Maryknoll, NY: Orbis Books.

Szulc, Tad. 1969. “Introduction.” In *The Rockefeller Report on the Americas: New York Times Edition*. Chicago, IL: Quadrangle Books.

Vecsey, George. 1979 “In Latin America, ‘liberation theology.’” *New York Times*, January 28, 1979. Accessed September 16, 2018. https://www.nytimes.com/1979/01/28/archives/the-bishops-meeting-in-latin-america-liberation-theology-pulls-both.html/.