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The social and economic message of Benedict XVI's Caritas in Veritate in the perspective of the Roman Catholic social doctrine

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

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

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

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

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

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

⁷⁹ See above II. 2.1.

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

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

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

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

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

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

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

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

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

2. *Leo XIII, 1878 – 1903*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

⁸⁶ *Rerum*, 51.

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

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

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

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

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

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

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

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

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

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

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

⁹⁰ *Compendium*, 89.

⁹¹ *Compendium*, 90.

3. Pius XI, 1922 – 1939

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

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

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

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

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

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

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

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

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

⁹⁴ See JARLOT, *Doctrine pontificale et histoire*, vol. II, 247.

⁹⁵ See JARLOT, *Doctrine pontificale et histoire*, vol. II, 261.

⁹⁶ See JARLOT, *Doctrine pontificale et histoire*, vol. II, 266.

⁹⁷ *Compendium*, 91.

⁹⁸ See JARLOT, *Doctrine pontificale et histoire*, vol. II, 272.

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

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

4. Pius XII, 1939 – 1958

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

¹⁰⁸ *Compendium*, 93.

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

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

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

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

5. John XXIII, 1958 – 1963

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

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

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

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

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

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

¹¹⁴ *Compendium*, 94 – 95.

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

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

6. The Second Vatican Council, 1962 – 1965

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

¹²⁷ *Compendium*, 96.

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

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

7. Paul VI, 1963 – 1978

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

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

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

¹³⁰ See *Gaudium*, 69.

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

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

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

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

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

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

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

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

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

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

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

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

¹³⁶ *Compendium*, 98.

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

¹³⁸ See *Gaudium*, 90.

¹³⁹ *Compendium*, 100.

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

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

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

8. John Paul II, 1978 – 2005

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

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

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

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

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

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

¹⁴¹ See *Compendium*, 101.

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

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

9. Concluding comments about the historical notes

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

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

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

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

¹⁴² *Compendium*, 103.

¹⁴³ See *Compendium*, 104.