

**PONTIFICAL UNIVERSITY  
ST PATRICK'S COLLEGE  
MAYNOOTH (IRELAND)**

**JON SOBRINO AND POPE FRANCIS:  
A NEW SPRINGTIME FOR THE PREFERENTIAL OPTION FOR THE  
POOR/VULNERABLE?**

A Dissertation Submitted to the Faculty of Theology  
for the Doctoral Degree in Theology

By  
Michel Simo Temgo, SCJ

Supervisor: Dr. Pádraig Corkery

Maynooth  
October 2018

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**DEDICATION**

To my parents

Papa Temgo Louis

&

Maman Kuissú Épouse Temgo Celestine,

RIP

## AUTHOR'S DECLARATION

I hereby declare that this project represents my own work and has not been submitted, in whole or in part, by me or by another person, for obtaining any credit/ grade. I agree that this project may be made available to future students of the College.

Signature: -----

Date: -----

## ACKNOWLEDGMENTS

Saint Patrick's College of Maynooth has been a generous and helpful environment for my research. Above all, I am infinitely grateful to God the Almighty Father, Jesus Christ and the Holy Spirit who enlightened me and continue to accompany me in all the stages of my life.

I am particularly thankful for the faculty of theology of Saint Patrick's College, my colleagues, and especially my supervisor Dr Pádraig Corkery. Dr Corkery has been a mentor for me. Without his guidance, encouragement and thorough instructions, this dissertation would never be completed. His scholarly expertise and genuine concern for my dissertation made this research possible.

I am also significantly appreciative of the support of the Sacred Heart Fathers of the British-Irish province and especially Fr John Kelly, SCJ who welcomed me in Ireland, helped me to settle, and allowed me to be integrated into the pastoral ministry in the Archdiocese of Dublin. Without their generous funding and brotherly support, this dissertation would have never happened. I am grateful and blessed for the great opportunity I was offered to study in St. Patrick's College and share in pastoral ministry at Saint John Vianney Parish in Dublin.

I am appreciative of Fr Hugh Hanley, SCJ who was always the first to read my work. His great sense of humour helped to lighten the challenges of translating my thoughts from French into English. I am also thankful for Sr. Mary O'Shea, (MSHR) and my teachers of English in the Divine Word School of English, Maynooth who patiently read each chapter and brought me to greater clarity. I am also thankful for the Sacred Heart Fathers in Brussels, Belgium and especially Professor Joseph Famerée, SCJ from the Catholic University of Louvain-La-Neuve who also contributed in my



recommendation to study at Saint Patrick's College, Maynooth and Father André Conrath, SCJ who was my mentor when I was in Brussels.

Finally, I am very pleased with the Sacred Heart Fathers of Cameroon and my family and friends: Tamo swop Gui, Taffe Gayap, Ta Simo whose encouragement kept me going. To my parents, Papa Temgo Louis and Maman Kuissú Celestine (RIP) who taught me by their example of perseverance and often said that, "if you never give up, good things will happen", I say 'Mó tó kwa', many thanks.

Michel Simo Temgo, SCJ

## **LIST OF ABBREVIATIONS**

**AD** APARECIDA DOCUMENT

**AL** AMORIS LAETITIA

**AM** AFRICAE MUNUS

**CA** CENTESIMUS ANNUS

**CDF** CONGREGATION FOR THE DOCTRINE OF THE FAITH

**CELAM** CONFERENCIA EPISCOPAL LATINOAMERICANA

**CSDC** COMPENDIUM OF THE SOCIAL DOCTRINE OF THE CHURCH

**CV** CARITAS IN VERITATE

**DCE** DEUS CARITAS EST

**EA** ECCLESIA IN AFRICA

**EG** EVANGELII GAUDIUM

**FC** FAMILIARIS CONSORTIO

**FR** FINAL REPORT

**GE** GAUDETE ET EXSULTATE

**GE** GAUDIUM EVANGELII

**GS** GAUDIUM ET SPES

**LS** LAUDATO SI'

**LC** LIBERTATIS CONSCIENTIA

**LE** LABOREM EXERCENS

**LG LUMEN GENTIUM**

**LN LIBERTATIS NUNTIUS**

**MM MATER ET MAGISTRA**

**PP POPULORUM PROGRESSIO**

**QA QUADRAGESIMO ANNO**

**RN RERUM NOVARUM**

**RS RELATIO SYNODI**

**SC SACRAMENTUM CARITATIS**

**SRS SOLLICITUDO REI SOCIALIS**

## ABSTRACT

Since its first use in the 1960s, the term ‘option for the poor’ has never stopped stirring up debate. In its development, the social teaching of the Church adopted the expression and even enriched it with the term ‘preferential’ at the meeting in Puebla (1979). To examine the universal appeal of the expression today, this thesis turns to two contemporary Jesuits: Jon Sobrino and Pope Francis. Sobrino is a Spaniard but has worked and continues to work as a missionary in El Salvador, in Latin America. Pope Francis is Argentinian. Before becoming Pope, he exercised his ministry in Latin America.

This research made up of six chapters, compares the theological views of Sobrino and Pope Francis to show not only the complexity of the expression itself but also to demonstrate that this expression should be replaced by an alternative expression. The introductory chapter sets the scene by analysing the origin and development of the term ‘preferential option for the poor’ and its various components. It also introduces the term ‘vulnerable’ and compares it to the term ‘poor’. The second chapter examines the notion ‘poor’ in Sobrino’s Christology and theology. The poor are also called ‘victims’ or ‘crucified people’ and they are central in Sobrino’s theology of salvation. For this reason, this research introduces a third chapter to analyse critically what is considered as a *credo* by Sobrino namely ‘*Extra Pauperes, Nulla Salus,*’ ‘outside the poor there is no salvation’ Chapters four and five are dedicated to Pope Francis. They offer not only the keys to interpret his theological thought but also make a critical analysis of his understanding of the poor.

The last chapter deals with the comparative analysis of the language used by the two Jesuits to describe the poor. It also points out the similarities and differences. The language of mercy is the common ground in their theological views. One of the differences between them is about the poor. Sobrino’s understanding of the poor focuses mostly on the economically poor while Pope Francis defines the poor in an inclusive way. He includes not only other forms of human suffering but also the sufferings of all of creation. Nevertheless, the two theological views are complementary. This harmonizing of views about the terms ‘poor’ and ‘mercy’ by Sobrino and Francis has raised questions about the use of the expression ‘preferential option for the poor’ in theology today. Considering the new forms of human suffering described by Pope Francis in today’s world, this thesis proposes to replace the ‘preferential option for the poor’ with the expression ‘compassion for the vulnerable’.

## RÉSUMÉ

Depuis sa naissance dans les années soixante, l'expression 'option pour les pauvres' n'a cessé de charrier les débats. Dans son développement, l'enseignement social de l'Eglise a adopté l'expression et l'a enrichi du terme 'préférentiel' (Puebla 1979). Pour examiner ce regain de l'expression aujourd'hui en théologie, cette thèse a choisi de se tourner vers deux Jésuites contemporains : Jon Sobrino et le Pape François. Sobrino est d'origine espagnole mais il a travaillé et continue de travailler comme missionnaire au El Salvador en Amérique Latine. Le Pape François est Argentin. Il a exercé son ministère avant d'être pape en Amérique Latine.

Cette recherche organisée autour de six chapitres, croise les deux regards pour montrer non seulement la complexité de l'expression mais aussi pour démontrer que cette expression très courue en théologie depuis les années postconciliaires est obsolète aujourd'hui. Le chapitre introductif plante le décor en faisant une analyse de la naissance et du développement de l'expression 'option préférentielle des pauvres' ainsi que ses diverses composantes. Il introduit aussi le terme 'vulnérable' et le compare au thème 'pauvre'. Le deuxième chapitre étudie la notion de 'pauvre' dans la Christologie et la théologie de Sobrino. Le pauvre appelé aussi 'victime' ou 'peuple crucifié' occupe une place centrale dans la théologie du salut de Sobrino. C'est en faisant une analyse critique de la place qu'occupe le pauvre dans sa théologie que cette recherche introduit un troisième chapitre portant essentiellement sur ce qui est considéré comme un credo dans sa théologie du salut à savoir '*Extra Pauperes, Nulla Salus.*' Les chapitres quatre et cinq sont consacrés au Pape François. Ils proposent non seulement les clés pour interpréter sa pensée théologique mais ils font aussi une analyse critique de ladite pensée sur les pauvres.

Le dernier Chapitre porte sur l'analyse comparative du langage utilisé par les deux Jésuites pour décrire les pauvres ainsi que les points de similitudes et de différences. Le langage de la miséricorde est bel et bien le terrain sur lequel se rencontrent Sobrino et le Pape François. La conception 'sobrinienne' du 'pauvre' est liée essentiellement à la pauvreté matérielle et à l'oppression subie par le peuple latino-américain tandis que le Pape François définit le pauvre dans un sens inclusif qui englobe non seulement les autres formes de souffrances humaines mais aussi toute la création. Le couple pauvre/vulnérable est ici convoqué pour montrer cette complémentarité. Ce regard croisé sur les termes 'pauvre' et 'miséricorde' a permis de questionner la nécessité d'utiliser l'expression 'option préférentielle des pauvres' aujourd'hui en théologie. En tenant compte des nouvelles formes de souffrances humaines décrites par le Pape François dans le monde d'aujourd'hui, cette thèse propose de remplacer l'expression 'option préférentielle des pauvres' par celle de 'compassion pour les vulnérables'.

## GENERAL INTRODUCTION

Is the “preferential option for the poor” experiencing a new springtime today? In attempting to sketch an answer to this question, this dissertation turns to Jon Sobrino and Pope Francis to study the language used by both to describe the poor/vulnerable today. Jon Sobrino and Pope Francis are Jesuits. Sobrino is a Spaniard missionary in El Salvador and a liberation theologian. Pope Francis is Argentinian and is influenced by the theology of the people. Through their common understanding of mercy, both Sobrino and Francis seek to stimulate a theological and pastoral response to the problem of human suffering in relation to the whole of creation. So, the research question of this thesis is: How can Sobrino’s and Francis’ understanding of mercy, applied to human vulnerability, stimulate a theological and pastoral response to human suffering today? In seeking an answer to this question, this study, comprising of six chapters, uses the analytical, comparative and critical methods.

The first chapter aims to set the scene for a comparative analysis of Francis’ and Sobrino’s language of the poor/vulnerable. It focuses on the historical and theological development of the expression “option for the poor” in theology. It also analyses this notion in the social teaching of the Church, and in the Jesuit tradition. It highlights the biblical and the theological meaning of the expression ‘option for the poor’. Furthermore, it analyses some concepts such as: option, preferential, poor and vulnerable.

The second chapter aims to examine Sobrino’s Christology, his understanding of the poor and his relationship to Liberation Theology. His Christology is constructed against the backdrop of his understanding of the poor and oppressed of Latin America, especially of El Salvador. For him, Liberation theology is the theology of salvation as liberation. Sobrino also puts emphasis on the reality of the victims in his Liberation theology. He calls the poor ‘the crucified people’ or ‘the victims’ of repression and war

in Latin America. He compares the crucified people to the suffering servant from Isaiah 52:13 to 53:12. Sobrino argues that ‘there is no salvation outside the poor’. His understanding of the poor and the place of the poor in his theology inspired the third chapter of this thesis, which is on the critical assessment of his theological thoughts on the poor.

The third chapter critically assesses Sobrino’s formula ‘there is no salvation outside the poor.’ It raises the following questions: How can Sobrino be sure that the poor are the only setting for salvation? Can it be possible for the non-poor also to be the setting for salvation? The contemporary history of theology indicates that some of the views of Liberation theology were not shared by the Magisterium. For that reason, this chapter also explores the contentious relationship between the Magisterium and Liberation theology based on the two documents of the Congregation for the Doctrine of the Faith (hereafter CDF) entitled *Libertatis Nuntius on Certain aspects of Liberation Theology* (1984) and *Libertatis Conscientia on Christian freedom and liberation* (1986). Furthermore, it investigates the Notification by the CDF of two of Jon Sobrino’s two books: *Jesucristo liberador. Lectura histórica-teológica de Jesús de Nazaret* (1991) and *La fe en Jesucristo: Ensayo desde las victimas* (1999). Again, this chapter examines the theological reactions to these documents on the relationship between the Magisterium and Liberation theology and the Notification by the CDF to Sobrino. The purpose of this study on Sobrino is to show not only the complexity of the understanding of the concept ‘poor’ in his Christology but, also to set the scene for the identification of the language used by him to describe the poor, which will be explored in detail in the last chapter.

The fourth chapter aims to highlight the historical context and some backdrops for interpreting Pope Francis’ theological thought on the poor. Firstly, it explores the influences on Pope Francis’ theological mind set; and secondly, it reviews some of his

writings prior to his election as Pope. Indeed, Pope Francis cannot be fully understood without a due and proper consideration of his time in Buenos Aires where he grew up, and exercised his ministry as a Jesuit Priest, a provincial, a bishop, an archbishop, and finally, a cardinal. Besides, the study of some selected writings of the former Father Bergoglio shows that his spiritual and pastoral approaches are rooted in the Ignatian tradition and especially in the theology of Incarnation. Since not everyone accepts Pope Francis' social and theological thought, this research also introduces a chapter on the criticisms of Francis' social and theological thought.

This fifth chapter focuses on the critical assessment of Francis' social and theological thought concerning the accusations made against him that, he is a Marxist or a communist. This chapter establishes that these accusations do not stand because, Pope Francis' social teaching is in continuity with a long tradition of the social doctrine of the Church, which has never made a concession to Marxism or to savage capitalism. In addition, this research uncovers Pope Francis' double approach to ethical thinking regarding vulnerable families. Firstly, it demonstrates that Francis' spiritual and pastoral approach in his Post Apostolic Exhortation *Amoris Laetitia* (2016) (hereafter AL) cannot be understood apart from theology as discernment of authentic life.<sup>1</sup> Pope Francis' lifestyle, papacy and theological thinking are deeply influenced by the theology of the *Spiritual Exercises*, which conveys an Ignatian *modus procedendi* of doing theology.<sup>2</sup> Theology as discernment has its limitations in the sense that discernment is related to the

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<sup>1</sup> Christoph Theobald, *Le Christianisme comme style : Une manière de faire de la Théologie en postmodernité* (Paris : Cerf, 2008), 413.

<sup>2</sup> Ibid. It appears clearly in the *Instrumentum Laboris* for the Synod 2018 on *Young People, The Faith and Vocational Discernment*. We read: "In discernment, we recognize a way of life, a style, a fundamental attitude and also a working method (...) Hence, discernment becomes a pastoral instrument..." (XV ORDINARY GENERAL ASSEMBLY OF THE SYNOD OF BISHOPS, *Young People, the Faith and Vocational Discernment*, & 2, Online: <http://www.synod2018.va/content/synod2018/en/fede-discernimento-vocazione/instrumentum-laboris-for-the-synod-2018--young-people--the-faith.html> (Accessed 24/10/2018)



freedom of the person involved and discernment lacks scientific certitude.<sup>3</sup> Secondly, AL cannot be fully understood outside the personalistic approach of conjugal love, which emphasizes the mutual growth of couples and the law of gradualness, all perceived through the lens of the concept ‘mercy’.<sup>4</sup> Mercy is a paradigm in this research and one of the common grounds between Sobrino and Pope Francis as it appears in the sixth and final chapter of this thesis.

The sixth and final chapter of this work, with the aim of comparing the language used by Sobrino and Pope Francis to describe the poor or vulnerable looks at the similarities and the differences between Sobrino and Pope Francis’ social and theological thought. It shows how both Sobrino and Pope Francis as Jesuits, are inspired by the Ignatian spirituality. They both utilize Scripture as a source of their theology, both use the language of mercy. Sobrino’s and Francis’ methods are contextual. Concerning the differences, Sobrino, like Pope Francis, uses the contextual methods but they are inspired by different contexts and theological schools. Sobrino’s method is stimulated by Liberation theology while Pope Francis’ method is inspired by the pastoral approach of See-Judge-Act and the theology of the people. Besides, Sobrino and Pope Francis understand the concept ‘poor’ differently. Sobrino places emphasis on the economically poor and oppressed while Francis understands the concept in an integral way. That is why in the last chapter, when referring to Francis, this research employs the term vulnerable. This research argues that the concept ‘vulnerable’ is inclusive of all categories of human suffering. Francis’ understanding of the concept “poor” integrates new forms of human suffering in relation to the whole of creation.

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<sup>3</sup> Christiana A. Astorga, *Catholic Moral Theology and Social Ethics: A New Method* (Maryknoll, NY: Orbis, 2014), 485.

<sup>4</sup> Thomas Knieps-Port le Roi and Roger Burggraeve, “New Wine in New Wineskins: *Amoris Laetitia* and the Church’s Teaching on Marriage and Family,” in *Louvain Studies*, 39 (2015-16), 290.

This dissertation argues that the emergence of new forms of human suffering in today's world constitutes a challenge to the use of the expression 'Preferential Option for the Poor'. It initiates a debate about the search for an alternative theological expression to the "preferential option for the poor" today in theology.

## CHAPTER ONE

### THE OPTION FOR THE POOR/VULNERABLE: ITS DEVELOPMENT IN THE MAGISTERIUM AND JESUIT TRADITION SINCE VATICAN II

#### 1.1 INTRODUCTION

This Chapter, with the aim of setting the scene for the analysis of Sobrino and Pope Francis' language of the poor/vulnerable, is divided into four sections. The first section outlines the option for the poor from the biblical point of view. Then it underlines the concept from the theological perspective. It also analyses some concepts such as: preferential, option, poor and vulnerable. The second section examines the option for the poor in the papal documents from Vatican II to Pope Benedict XVI. It starts by presenting the option for the poor in the previous one hundred years in order to bring out the line of continuity in the Social Teaching of the Church. The third part studies the option for the poor in the Regional Episcopal Conference of Latin America with a special attention given to the Medellin, and Puebla Conferences. The last and fourth section of this chapter is dedicated to studying the option for the poor in the Jesuit tradition after Vatican II.

#### 1.2 OVERVIEW OF THE CONCEPT 'OPTION FOR THE POOR'

##### 1.2.1 Brief Biblical Panorama of the Option for the Poor

The Option for the Poor is one of the essential characteristics of the testimony of Christian churches;<sup>5</sup> which has its foundation in the Bible. It starts with the preferential option of love of God for the Poor in the Old Testament.<sup>6</sup> The Irish theologian John O'Brien states:

The Option for the Poor may be justified in principle as the practical base of a theological method on the basis of the origin of the Judeo-Christian tradition in the Exodus narrative of liberation; the focusing of this tradition in the religion of prophetic monotheism with its denunciation of greed and marginalization; the fulfilment of this tradition in Jesus, who demonstrates a

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<sup>5</sup> René Coste, *Les dimensions sociales de la foi : Pour une théologie sociale* (Paris : Cerf, 2012), 471.

<sup>6</sup> Pierre Coulange, *L'option préférentielle pour les pauvres* (Paris : Parole et Silence, 2011), 11.

preferential concern for the marginalized and who on the cross is the poor and marginalized person *par excellence*.<sup>7</sup>

It is said that the Option for the Poor has its meaning in the understanding of God as a God of liberation who hears the cries of the poor (Ps. 12:5).<sup>8</sup> God heard the cry of the Israelites suffering in Egypt, he led them out of Egypt.<sup>9</sup> Jorge Pixley and Clodovis Boff assert that God's love for Pharaoh was mediated through God's preferential love for the Israelite slaves.<sup>10</sup> We find this preference of God for the Israelites who were suffering in the Book of Exodus. It reads as follows:

Yahweh then said, 'I have indeed seen the misery of my people in Egypt. I have heard them crying for help on account of their taskmasters. Yes, I am well aware of their sufferings. And I have come down to rescue them from the clutches of the Egyptians and bring them up out of that country, to a country rich and broad, to a country flowing with milk and honey (Ex 3: 7-8).

For Clodovis Boff, the exodus manifests a vision of God, who takes the side of the oppressed. From this perspective of God's preference for the marginalised, it could be said that God did the same for the orphans and the widows. The prophets also protested against social injustices in the Old Testament (Am 2:6; 4:1; 5:12; Is 3:14-15; 10:1-2; Jer 22:3). Donal Dorr cites a few Bible texts in which God asked, "that the laws of the land would protect and give redress to the poor, the indebted, the widows, the resident foreigners, the animals (domestic or wild), and even the earth itself (Lev 19:33; 25:10-16; Ex 15:12-15; 22:21; 23:11; Deut 23:12; 25:4)."<sup>11</sup>

In the New Testament, Jesus grew up and exercised his ministry among the common people. His life was characterised by what the Jesuit theologian Christoph Theobald calls '*un style messianique et eschatologique*'.<sup>12</sup> In fact, the lifestyle of Jesus

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<sup>7</sup> John O'Brien, *Theology and the Option for the poor* (Minnesota: The Liturgical Press, 1992), 79.

<sup>8</sup> McGraw Hill, "Poor, Poverty," in *Bible Dictionary* (New York: Harper Collins, 2011), 816.

<sup>9</sup> Jorge Pixley and Clodovis Boff, eds., *The Bible, the Church and the Poor: Biblical, Theological and Pastoral Aspects of the option for the poor* (Trans. Paul Burns. Sao Paulo: CESEP, 1987), 17.

<sup>10</sup> *Ibid.*

<sup>11</sup> Donal Dorr, "Poor, Preferential Option for," in *The New Dictionary of Catholic Social Thought* (Collegeville: The Liturgical Press, 1994), 756.

<sup>12</sup> Theobald, *Le Christianisme comme style*, 59.

could be summarized by the French expression ‘*sainteté hospitalière*’.<sup>13</sup> In the synoptic Gospels, Jesus shows his closeness to the marginalized such as lepers, prostitutes and tax collectors, and his encounter with them transforms their lives (Mt 8:1-4; 9:10; Mk 1: 40-45; 2: 13-17; Luke 7:36-50; 17:11-19; 19:1-10). Jesus introduces himself “as the person in whom was fulfilled God’s promise to send one who would come ‘to bring good news to the poor, to proclaim liberty to captives’ (Lk 4: 18-21). Central to his teaching was the proclamation that the poor and the hungry are blessed by God (Lk 6: 20-21).”<sup>14</sup>

For Gerald Twomey, the origin of the option for the Poor is in the Gospel of Saint Matthew. He writes: “the option for the Poor was first proclaimed for Christians in the 25<sup>th</sup> chapter of Saint Matthew’s Gospel: ‘I was hungry, and you fed me, I was thirsty, and you gave me drink, I was naked, and you clothed me...’ (Mt 25: 35).”<sup>15</sup> The current section does not intend to study the exegetical meaning of the option for the poor but will focus on the theological significance of the concept.

### **1.2.2 Theological Development of the ‘Option for the Poor’**

According to Daniel Groody,

theological reflection begins from the perspective of those who are poor, those who are marginalized from mainstream society, who have no influence or voice in the socioeconomic and political processes that so profoundly shape their lives and condemn them to dehumanizing misery.<sup>16</sup>

Several theologians such as Donal Dorr, Daniel G. Groody and Gerald Twomey agree that the term ‘option for the poor’ emerged about the year 1960 in the terminology of the Latin American Church. This term implies the struggle against poverty, injustice and oppression in society. Gustavo Gutierrez and Daniel G. Groody state:

In the 1960s the expression “preferential option for the poor” emerged, little by little, as a message from numerous Christians from Latin America who were struggling to be in solidarity with those in great need. While this

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<sup>13</sup> Ibid., 62.

<sup>14</sup> Dorr, “Poor, Preferential Option for,” 756.

<sup>15</sup> Gerald S. Twomey, The “Preferential Option for the Poor,” in *Catholic Social Thought from John XXIII to John Paul II* (Lewiston: The Edwin Mellen Press, 2005), i.

<sup>16</sup> Daniel G. Groody, ed., *The Option for the poor in Christian Theology* (Indiana: Notre Dame, 2007), 5.

expression was rooted in Christian faith and praxis, because of its humanistic dimension it also appealed to others who shared similar social, although not always theological convictions.<sup>17</sup>

For Stephen Pope, even though the expression has become a major theme in contemporary Catholic ethics, “it is highly contested.”<sup>18</sup> Nevertheless, Donal Dorr defines the term as a commitment by Christian individuals and Christian communities in the fight against the social injustices in our world. This commitment asks for a real solidarity with the victims of our society, the oppressed and the marginalized. The Christian or Christians who take this option must share the sufferings, the joys and the hopes of those who are marginalized in our society<sup>19</sup>.

Without this real solidarity, the option for the poor would place the poor person in a situation of dependence and paternalism. If so, it makes the poor weak and even poorer. As a matter of fact, the option for the poor should be a commitment to resist the structures of injustice in our world. The person who makes such a commitment tries to establish a more just society. It implies a constant effort to change the inequitable economic, social and political structures for a more just and fairer world.<sup>20</sup>

Donal Dorr insists on personal commitment in the face of the option for the poor. He considers it as a personal choice, which involves a private asceticism and a compassion for the marginalized. For him, the option for the poor is based on a series of personal choices made by individuals, communities or entities such as religious congregations, dioceses or the Church in general. The dangers and the complexity of such a commitment could be expressed through the following question: how can the Church avoid serving the cause of those who are leaders of society to the disadvantage

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<sup>17</sup> Daniel G. Groody and Gustavo Gutierrez, eds., *The Preferential Option for the Poor beyond Theology* (Indiana: Notre Dame, 2014), 2.

<sup>18</sup> Stephen J. Pope, “Proper and Improper partiality and the Preferential Option for the Poor,” in *Theological Studies*, 54 (1993), 242.

<sup>19</sup> Gerald S. Twomey, *The “Preferential Option for the Poor,”* in *Catholic Social Thought from John XXIII to John Paul II* (Lewiston: The Edwin Mellen Press, 2005), 8.

<sup>20</sup> Twomey, *The “Preferential Option for the Poor,”* 9.

of the poor and of the most marginalized? Such compassion and solidarity also involve a commitment to a structure, which promotes the interests of the less-favoured. This involves those who are economically poor and those who are marginalized and oppressed.<sup>21</sup>

John O'Brien reflects on the dimensions of the option for the poor as viewed by theologians who exercise an intellectual service. According to O'Brien the intellectual service of theologians is useful for the option for the poor. The commitment by theologians to the option for the poor is based on their personal orientation. He suggests four dimensions to describe the context of any intellectual undertaking, including theology: the individual-personal dimension, the interpersonal dimension, the structural dimension, and the institutional dimension. These four dimensions are defined in relationship to evangelical simplicity, existential solidarity, transformational analysis and institutional challenge.<sup>22</sup>

Regarding the individual-personal dimension, he refers to the theologian as an individual who freely makes an option for the poor. John O'Brien notes that it is the equivalent of evangelical simplicity. Here the theologian does not only commit himself or herself at the academic level to the poor, but he makes himself poor with the poor. However, poverty is understood as "detachment from wealth and privilege proposed by the Gospels, the Christian tradition, and, in particular, by the religious life."<sup>23</sup> In this case, it is understood that the option for the poor demands of theologians to profess a vow of poverty. This is understandable because John O'Brien himself is a Spiritan Priest, who lived and worked in one of the most deprived areas of Dublin for many years.<sup>24</sup>

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<sup>21</sup> Donal Dorr, *Option for the Poor and for the Earth: Catholic Social Teaching* (New York: Orbis Books, 2012), 8-9.

<sup>22</sup> John O'Brien, *Theology and the Option for the poor* (Minnesota: The Liturgical Press, 1992), 79-80.

<sup>23</sup> *Ibid.*, 81.

<sup>24</sup> *Ibid.*

In the context of the interpersonal dimension, theologians express themselves in interconnection with others. O'Brien calls this interconnectedness existential solidarity. In this sense, "the theologian herself seeks a living *koinonia* in the faith with people who are poor and oppressed. Realizing that as a human being she becomes herself through relationality with others, she faces the question of who these others may be."<sup>25</sup> *Koinonia*, a word transliterated from Greek means communion. The theologian is invited to share with others, to join with others to tackle the problem of poverty. The theologian should be free to exercise this duty. She benefits from mutual enrichment with the poor and must learn from the poor. Besides, "the theologian is present to the poor first as a learner. To be able to read the book of their experience requires genuine solidarity. There can be no theology that is not a reflection on ecclesial faith; there can be no ecclesial faith without *koinonia*; there can be no *koinonia* that does not privilege solidarity with the poor."<sup>26</sup>

Coming to the structural dimension, John O'Brien mentions that every theology, which emphasizes the option for the poor requires a socio-analytical hermeneutical mediation. It means that theologians must consider that every human being is a social agent and take into account a sociological imagination or the existence of sociology as a science. Consequently, the structural dimension implies a transformational analysis. In fact, details of social reality prevent and disclose the naiveté of the individual or interpersonal approach to the question of poverty.

Finally, for O'Brien, the option for the poor in this context requires an interdisciplinary approach. He states:

To deal theologically with this complex reality requires an interdisciplinary approach. Here theology requires a necessary socioanalytical hermeneutical mediation to deal with socio-political reality, just as it would require a

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<sup>25</sup> Ibid., 82.

<sup>26</sup> Ibid., 83.



psychological hermeneutical mediation to deal with the details of the dynamics of personal spiritual growth.<sup>27</sup>

Talking about the institutional dimension, O'Brien underlines that theologians who opt for the poor belong to the institution. In the current case, this institution is the Catholic Church. However, the problem is the challenge faced by the ambiguity of every institution. He calls it the institutional challenge. The option for the poor within an institution or set of institutions is much more complex because institutions may be allied to structures of power and privilege that do not always operate for the interests of genuine emancipation of the poor. Aware of this danger, John O'Brien suggests an institutional self-criticism. For the Church, he recalls the Latin formula '*Ecclesia semper reformanda est*', which refers to the self-criticism of the Church as institution. The Church always needs to re-examine itself<sup>28</sup> For Gustavo Gutierrez,

The preferential option for the poor constitutes a part of following Jesus that gives ultimate meaning to human existence, and that gives us as believers "reason to hope" (1 Pt 3:15). It helps us see the understanding of faith as hermeneutics of hope, an interpretation that must be constantly enacted and re-enacted throughout our lives and human history, building up reasons for hope. Finally, the option for the poor propels us to discover appropriate paths for a prophetic proclamation of the kingdom of God, a communication that respects and creates social justice, communion, fraternity, and equality among people.<sup>29</sup>

### **1.2.3 Theological meaning of the terms 'Preferential' and 'Option'**

The term preferential was added to the phrase option for the poor by the Conference of the Bishops of Latin America at Puebla in 1979. The first chapter of part four of the 'Puebla Document' is dedicated entirely to the preferential option for the poor. An extract of number 1134 reads as follows: "We affirm the need for the conversion on the part of the whole Church to a preferential option for the poor, an option aimed at their integral

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<sup>27</sup> Ibid., 84.

<sup>28</sup> Ibid., 87.

<sup>29</sup> Gustavo Gutierrez, "The Option for The Poor Arises from Faith in Christ," in *Theological Studies*, Trans. Robert Lassalle-Klein, 70 (2009), 317-26, 326.

liberation.”<sup>30</sup> The ‘Puebla Document’ will be analysed thoroughly in the third part of this chapter.

Gustavo Gutiérrez makes a detailed analysis of the word ‘preference’. For him, it is a “Christian term, which forces us to protect the universality of God's love from which nobody is excluded.”<sup>31</sup> It is only within this universal framework of God’s love that we can understand the preference, that is, ‘what is first’. To support his argument, the Peruvian theologian makes reference to the Bible. He underlines that the Bible speaks about God's preference for poor people. He asks:

Why, in Genesis, did God prefer Abel to Caïn? It is not stated that Abel was better, a very good person, and that Caïn was someone bad. But Abel was the second, he had less human weight. God preferred Abel's sacrifice to the sacrifice of Caïn. The sin of Caïn is to have denied God's preference for Abel. It is for that reason that he killed him.<sup>32</sup>

Is Gutiérrez interpretation of the word preference based on exegesis? The answer to this question is not the aim of our study in the current section. However, it is useful to underline Gutiérrez’ relevance of the word ‘preference’. The central point of his analysis is the challenge to hold together the universality of God's love and preference for the poor. He acknowledges that this is not easy, and that the balance remains a big challenge. Nevertheless, he gives the reason for such preference for the poor. He says: “We have to prefer the poor first because God is good and because he prefers the most forgotten, the oppressed, poor people, and the abandoned. The foundation is in God. The ultimate, final reason of the ‘preference’ is the God of our faith.”<sup>33</sup>

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<sup>30</sup> THIRD GENERAL CONFERENCE OF LATIN AMERICAN BISHOPS, *Puebla: Evangelization at present and in the future of Latin America* (Trans. National Conference of Catholic Bishop of USA. Mexico: CELAM, 1979), 178. Nevertheless, this information on the use of the word preferential sheds light on the question of some friends who remarked that the concept “‘preferential’ option for the poor” is much more common in English speaking countries than ‘option for the poor’.

<sup>31</sup> Gustavo Gutiérrez, *A Theology of Liberation* (Trans. Sister Caridad Inda and John Eagleson. New York: Orbis Books, 1973), 129.

<sup>32</sup> Ibid.

<sup>33</sup> Ibid., 130.

Daniel G. Groody also analyses the concept 'preference'. From the theological perspective, he states that the notion of preference refers more to the goodness of God than it does to the goodness of the poor. It means that "God reaches out in love to those who have a greater need, to those who are most in pain, to those whose life is most threatened."<sup>34</sup> Finally, the preference has something to do with God's love, God's mercy for people in need and especially the most vulnerable. There is a direct connection between the notion of preference and option.

For Groody, the word option does not mean optional, but a deliberate choosing of the needs of the marginalized, the excluded over others. In our society, the tendency is to pay greater attention to the rich. For this reason, making an option implies giving primacy to the concerns and interests of the vulnerable. It means that those who commit themselves for the poor also choose "voluntary poverty, living and working directly with the poor. Others will strive for their liberation and empowerment in other ways."<sup>35</sup> Those people are just one of the agents of option for the poor. They belong to an institutional Church.<sup>36</sup> The poor are also agents of the option for the poor because they commit themselves in "terms of solidarity among themselves, of openness to the poorest of the poor, and finally by welcoming the non-poor who seek to become their companions on the way."<sup>37</sup>

#### **1.2.4 Meaning of the terms 'Poor' and 'Vulnerable'**

In an article published in 1993,<sup>38</sup> Gutiérrez underlines the ambiguity of the word poverty. For him poverty is an ambiguous term, which deserves to be analysed. In its primary

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<sup>34</sup> Daniel G. Groody, *Globalization, Spirituality and Justice: Navigating the Path to Peace* (New York: Orbis books, 2013), 195.

<sup>35</sup> *Ibid.*, 196.

<sup>36</sup> Jorge Pixley and Clodovis Boff, eds., *The Bible, the Church and the Poor: Biblical, Theological and Pastoral Aspects of the option for the poor* (Trans. Paul Burns. Sao Paulo: CESEP, 1987), 135-136.

<sup>37</sup> *Ibid.*, 136.

<sup>38</sup> Gustavo Gutiérrez, "Option pour les pauvres : bilan et enjeux," in *Théologiques*, Vol. 1, n° 2, 1993, 121-134.

sense, the term refers to material poverty. In other words, it means simply the lack of economic necessities to live in a dignified way.<sup>39</sup> The American economist Jeffrey D. Sachs has the same view as Gutiérrez, but he goes further when analysing the term ‘material poverty’.

Sachs distinguishes three degrees of material poverty: extreme poverty, moderate poverty and relative poverty.<sup>40</sup> The sense given by Gutiérrez to the phrase material poverty could refer to the first degree of poverty as conceived by Jeffrey D. Sachs. Sachs describes extreme poverty, which he calls, a tragedy in the following way: “The greatest tragedy of our time is that one sixth of humanity is not even on the development ladder. A large number of the extreme poor are caught in a poverty trap, unable on their own to escape from extreme material deprivation.”<sup>41</sup> This is exactly the kind of poverty, which leads to premature death as perceived by Gutiérrez.

For Gutiérrez, poverty refers to deprivation of the physical and material needs of humans, which can lead to death, the inequitable and premature death of poor people. To support his definition, the Peruvian theologian remarks that it is not only in Latin America that people die of diseases, which medicine has already overcome.

Gutiérrez tells a joke, which circulates in Peru: “Cholera kills poor people, and only poor people, because, if you have a little money, you can boil the water and the very fragile virus dies at sixty degrees Celsius. You can see how, it is easy to protect yourself

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<sup>39</sup> Gustavo Gutiérrez, *A Theology of Liberation* (Trans. Sister Caridad Inda and John Eagleson. New York: Orbis Books, 1973), 288.

<sup>40</sup> Jeffrey D. Sachs, *The End of Poverty: Economic Possibilities for Our Time* (USA: Penguin Press, 2006), 20.

<sup>41</sup> *Ibid.*, 19. Also see Corine Pelluchon who states that “six milliards et demi d’êtres humains habitent la terre et, parmi eux, un milliard ont faim. Six mille enfants meurent chaque jour pour avoir bu de l’eau non potable.” (Corine Pelluchon, *Eléments pour une éthique de la Vulnérabilité : les hommes, les animaux, la nature* (Paris : Cerf, 2011), 13. Leonardo Boff, *Francis of Assisi : A Model for Human Liberation* (Trans. John W. Diercksmeier; Maryknoll, NY: Orbis, 1982), 53-57.

from cholera, but people have no money even to boil their water.”<sup>42</sup> This is what Sachs calls extreme poverty. It happens when:

households cannot meet basic needs for survival. They are chronically hungry, unable to access health care, lack the amenities of safe drinking water and sanitation, cannot afford education for some or all of the children, and perhaps lack rudimentary shelter, a roof to keep the rain out of the hut, a chimney to remove the smoke from the cook stove and basic articles of clothing, such as shoes.<sup>43</sup>

According to Gutierrez, this extreme material poverty is similar to the way that the Bible describes it. He says: “What we mean by material poverty is a subhuman situation. As we see, the Bible also considers it this way. 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.”<sup>44</sup>

For Sachs, moderate poverty or relative poverty is found particularly in the so-called ‘developed countries’. Relative or moderate material poverty refers to a lack of material goods for subsistence but in a limited way. Coming back to Gutiérrez, this form of poverty does not lead to physical death. So, relative material poverty refers for example, to a household, which has an income below an average national income. In this case the household cannot have access for instance to cultural property such as leisure activities, recreation, and quality health care.<sup>45</sup>

There is also spiritual poverty. This is linked to an internal attitude and a non-attachment to goods. In this case, the poor person possesses tangible assets but does not become attached to them. This form of poverty inspired by the Beatitudes of Matthew refers to the ‘poor in spirit’ (Mt 5, 3). For Gutiérrez, the danger of spiritual poverty is found in the way of living of those who choose this kind of poverty. Spiritual poverty

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<sup>42</sup> Ibid., 127.

<sup>43</sup> Ibid., 20.

<sup>44</sup> Ibid., 289.

<sup>45</sup> Ibid.

becomes a tranquilizer from the moment when those who live it do not pay any more attention to the needs of the excluded.

Gutiérrez underlines another dimension of poverty. He conceives poverty as commitment. In fact, this kind of poverty should be assumed by all Christians. It is characterised by solidarity with the poor and especially protestation against poverty.<sup>46</sup> The distinction between the three concepts of poverty: material poverty, spiritual poverty and poverty as a commitment is the result of the engagement of the universal Church after Vatican II for a radical and authentic witness to poverty. Many Religious Congregations responded to the demand. The Fourth part of the current study will be dedicated especially to the actions taken by Jesuits.

Concerning the meaning of the word ‘poor’, Gutiérrez admits that there is no good definition. Nevertheless, he defines poor people as the ‘*in-signifiants*’, which means the people who do not matter for society and even very often for the Christian Churches. It is worth highlighting the radicalism and paradox in the thought or the definition of poor people given by the Peruvian theologian. On this point, Gutiérrez may be too critical of the Christian Churches. For him, poor person is understood as the one who can wait a week at the door of a hospital to see a doctor. This is a reality and what is still taking place not only in Latin America but also in Africa for example in Cameroon. Gutiérrez is more pragmatic when he defines the poor person as one who has no social weight, who suffers from inequitable laws and who has no power to speaking in order to change this situation.<sup>47</sup>

What Gutiérrez describes is also analysed by the theologians Jorge Pixley and Clodovis Boff. However, they go beyond the meaning of the poor as defined by Gutiérrez.

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<sup>46</sup> Gustavo Gutiérrez, “The task and content of liberation theology,” in *The Cambridge Companion to Liberation Theology* (Trans. Judith Condor; Oxford: Cambridge University Press, 2007), 19.

<sup>47</sup> *Ibid.*, 127.

They analyse the poor according to certain contexts and situations. For them the meaning of 'poor' can be summarised by three adjectives: collective, conflictive and alternative.<sup>48</sup> The poor are clearly linked to material poverty. The first and the second adjectives will be analysed but not the third because it refers to solutions for their liberation. The poor are those who lack the basics to live. They make up the majority in the so-called 'Third World'. The poor in this perspective are presented as a collective phenomenon.<sup>49</sup> The poor are the product of a social phenomenon that does not arise naturally. Those who are poor in this way have been reduced to poverty by the force of a system of domination.

It means that the poor are exploited or rejected by a perverse economic system. Pixley and Clodovis Boff place these victims of the system in two groups: the marginalized and the exploited. Who are the marginalized? They can be classified in two categories: the unemployed or part-employed and the whole range of the wretched such as beggars, abandoned children, outcasts, prostitutes.<sup>50</sup> Finally, the marginalized symbolise the poor who are outside the prevailing economic system while the exploited are those whom the socio-economic system treats unjustly. It infers that the exploited are not outside the prevailing economic system, but that they are inside and have been treated unjustly. Among them could be found industrial workers, full-time and seasonal wage-earners, smallholders, settlers and tenant farmers.<sup>51</sup>

Within this complex definition of the categories of poverty and the poor also emerge categories of dependence and even of interdependence. One could also speak of a vulnerability, which describes their situation not only of precariousness but also of fragility related to the so-called poor person. Industrial workers or other categories of

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<sup>48</sup> Jorge Pixley and Clodovis Boff, eds., *The Bible, the Church and the Poor: Biblical, Theological and Pastoral Aspects of the option for the poor* (Trans. Paul Burns. Sao Paulo: CESEP, 1987), 1.

<sup>49</sup> Ibid., 2.

<sup>50</sup> Ibid., 3.

<sup>51</sup> Ibid., 4.

worker “can be said to be vulnerable to future loss of welfare, and vulnerability is caused by uncertain events.”<sup>52</sup>

For example, the French philosopher Guillaume le Blanc remarks that, “to live is to be exposed to the possibility of being weakened, of being hurt”.<sup>53</sup> It is what Sturla J. Stalsett refers to as “homo vulnerabilis.”<sup>54</sup> It is “an ontological condition of our humanity, a universal, inevitable, enduring aspect of human condition.”<sup>55</sup> In other words, vulnerability is the “ability to be corporeally, mentally, emotionally, existentially affected by the presence, being, or acting of another or something other (...).” Vulnerable is also “openness, relatedness, mutability, and communicability.”<sup>56</sup> When we speak about vulnerability, it is not something external to us. Le Blanc finds in vulnerability a kind of reciprocity with oneself in the sense that “la vulnérabilité de l’autre incluant nécessairement la possibilité de ma propre vulnérabilité, d’être blessé par une autre vie ou par un pouvoir particulièrement injurieux.”<sup>57</sup> Le Blanc’s reflection on vulnerability is opposed to the logic of thinking about vulnerability in terms of the included or the excluded, between those who are inside and those who are outside.<sup>58</sup> From the theological perspective Nico Koopman defines the concept of vulnerability as

The tragic, contingent nature of existence in general; the various forms of suffering of humans and of other creatures in all their relationships; the fragility and interdependence of humans and of other creatures in all their relationships; the predisposition to pain and suffering of so many humans and other creatures; the style, mode, and attitude of brokenness, empathy, softness, and humbleness; and, regarding God, it refers to his compassion

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<sup>52</sup> J. Alwang, P. Siegel, and S. Jorgensen, “Vulnerability: A View from Different Disciplines: Social Protection Unit, Human Development Network, The World Bank, Washington, 2001,” available at [https://www.uni-hohenheim.de/fileadmin/einrichtungen/sfb564/events/uplands2002/Full-Pap-S1-1\\_Siegel.pdf](https://www.uni-hohenheim.de/fileadmin/einrichtungen/sfb564/events/uplands2002/Full-Pap-S1-1_Siegel.pdf) (accessed 03/05/2018)

<sup>53</sup> See Guillaume le Blanc, *Que faire de notre Vulnérabilité ?* (Paris: Bayard, 2012).

<sup>54</sup> Sturla J. Stalsett, “Towards a political Theology of vulnerability,” in *Political Theology*, Vol. 16, 5 (September 2015), 467.

<sup>55</sup> Catriona Mackenzie, Wendy Rogers, and Susan Dodds, eds., *Vulnerability: New Essays in Ethics and Feminist Philosophy* (Oxford: University Press, 2014), 4. They quote many other theorists who understand the concept in an ontological way: “Butler (2004, 2009), MacIntyre (1999), Nussbaum (2006), Ricoeur (2007), Schildrick (2002), and Turner (2006).” (Ibid.)

<sup>56</sup> Ibid.

<sup>57</sup> Ibid., 157.

<sup>58</sup> Ibid.



with the suffering world, and to the interdependence of the three persons with the Trinity.<sup>59</sup>

Natalie Maillard considers the concept of vulnerability as a new moral category, which has developed in opposition to Western moral theories and place a special emphasis on the rational rather than the sensitive subject. For her, ethics that focus on vulnerability often emphasize the affective dispositions that make it possible to perceive and respond to situations of vulnerability.<sup>60</sup> In this perspective, vulnerable people are those who, because of their incapacity, can no longer protect their own interests, and run the risk of being manipulated, exploited and even treated as mere things.<sup>61</sup> The concept itself comes from “the Latin verb ‘vulnerare’ (wounding) and the noun ‘vulnus’ (wound). (...) susceptible of receiving injuries, open to attack or damage, capable of being physically or emotionally wounded.”<sup>62</sup> Following in the steps of Jesus, the tradition shows that, over the years, the Catholic Church committed herself to vulnerable people as is highlighted in some selected papal documents and Vatican II documents in the next section.

### **1.3 THE OPTION FOR THE POOR IN SOME SOCIAL PAPAL DOCUMENTS AND IN TWO VATICAN II DOCUMENTS**

The Second Vatican Council (1962-65) was a significant turning point in the life of the Catholic Church. It is also said that it was one of the “most significant expressions ever of the teaching authority of the Roman Catholic church.”<sup>63</sup> On the one hand, Vatican II focused on the assessment and the renewal of the Church, especially the church’s

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<sup>59</sup> Nico Koopman, “Vulnerable Church in a Vulnerable World? Towards an Ecclesiology of Vulnerability,” in *Journal of Reformed Theology*, 2 (2008), 241.

<sup>60</sup> Nathalie Maillard, *La Vulnérabilité : Une Nouvelle Catégorie Morale* (Genève : Labor et Fides, 2011), 161-162.

<sup>61</sup> Ibid., 172. Maillard distinguishes three forms of vulnerability : phenomenological, ontological and social : “La vulnérabilité au sens phénoménologique, qui désigne notre susceptibilité, comme sujet moral, à être touché par la détresse, la souffrance ou la fragilité d’autrui. (...) la signification ontologique de la vulnérabilité, qui désigne le plus souvent notre fragilité corporelle ou biologique ; la signification sociale de la vulnérabilité, qui désigne la fragilité de groupes particuliers et des personnes défavorisées in la société.” (Ibid., 196.)

<sup>62</sup> Henk Ten Have, *Vulnerability: Challenging bioethics* (London: Routledge, 2016), 3.

<sup>63</sup> Frederick J. Cwiekowski, “Vatican Council II,” in *The New Dictionary of Catholic Social Thought* (Collegeville: The Liturgical Press, 1994), 962.

relations to the contemporary world. On the other hand, it situated itself in continuity with the teachings of the Catholic Church prior to the Council, especially those of the previous hundred years.<sup>64</sup> To honour this continuity of the Social Teaching of the Church, this study begins by looking at the option for the poor from *Rerum Novarum* to Vatican II. Then, it focuses on the option for the poor in some selected papal social documents after Vatican II until pope Benedict XVI.

### **1.3.1 The Option for the Poor from *Rerum Novarum* to Vatican II**

John O'Brien states that the "modern magisterial teaching on the question of poverty begins with Leo XIII's *Rerum Novarum* (1891)."<sup>65</sup> It is also said that Vatican II is a part of a "continuum that begins with the magisterial teaching of Leo XIII (1878-1903)."<sup>66</sup> The Encyclical<sup>67</sup> letter *Rerum Novarum* issued on 15 May 1891 analyses the condition of the working classes. For Thomas A. Shannon, *Rerum Novarum* (hereafter RN) (1891) emerged out of critical international discussions of social issues, and social turmoil in western Europe. There was a rise of nationalism across Europe. Communists led by the thoughts of Karl Marx and Friedrich Engels were inspired by the publication of the *Communist Manifesto* in 1848. In the economic context, the industrial revolution and the rise of capitalism encouraged the poor to leave the countryside for the city. Little by little, modern cities with their crowded conditions began to develop. With the excess of workers in the cities, factory owners were able to depress wages leading to the impoverishment of many workers. Industrial development with all its consequences spread from England

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<sup>64</sup> Ibid., 962.

<sup>65</sup> John O'Brien, "Poverty," in *The New Dictionary of Catholic Social Thought* (Collegeville: The Liturgical Press, 1994), 771.

<sup>66</sup> Ibid., 963.

<sup>67</sup> "Encyclicals are letters addressed by the pope to the Catholic bishops throughout the world and through them to the whole Church. Frequently, they are also addressed to all those prepared to listen to their teaching, irrespective of religious adherence." [John Molony, *The Worker Question: A new historical perspective on Rerum Novarum* (Dublin: Gill and Macmillan, 1991), 1.]

to Belgium, Germany, France and Italy leading to child labour, poor wages, and dangerous working conditions.<sup>68</sup>

The encyclical focuses on the change of economic conditions, the relation between capital and labour, employee and employer, and the wealthy and the poor.<sup>69</sup> The new economic conditions raised some problems and challenges such as poor wages and dangerous working conditions. The Pope proposes a new understanding of the role of distributive justice, the correct use of authority, the protection of the workers, a just wage, a “regulation of labour by children and women, as well as instilling in workers a sense of hope for the future so that they will have a foundation for perseverance in the tasks of this world.”<sup>70</sup> Pope Leo XIII stated the “enormous fortunes of some few individuals, and the utter poverty of the masses.” (RN 1)

Concerning the themes: the poor and poverty, Pope Leo XIII highlights the relationship between the Church and the poor. He recalls that the Church does not concern itself only with the spiritual dimension of its members but also with the earthly ones, especially regarding the poor. He states that the desire of the Church is that “the poor, (...) should rise above poverty and wretchedness, and better their condition in life.” (RN 28) In addition, the concern of the Church for the poor is not just limited to its desire to help those less fortunate but also to intervene directly on their behalf and to maintain many associations, which she knows to be efficient for the relief of poverty (RN 29).

In the past, the Church worked to provide for the poor and their needs. This service for the poor gave rise to Religious Congregations whose main purpose was helping them (RN 30). Furthermore, Leo XIII refers to the role of the State in finding a

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<sup>68</sup> Thomas A. Shannon, “Commentary on *Rerum Novarum* (The Condition of Labor)” in *Modern Catholic Social Teaching: Commentaries and Interpretations* (Washington: Georgetown University Press, 2005), 128-129.

<sup>69</sup> Ibid., 128.

<sup>70</sup> Ibid.

solution to poverty. For him, the State is “any government conformable in its institutions to right reason and natural law” (RN 32). It is a duty of the State to “benefit every class in the State, and amongst the rest to promote to the utmost the interests of the poor.” (RN 32) Pope Leo XIII insists on distributive justice toward each and every class of society, rich as well as poor. For him, it is an obligation not of charity but of justice.<sup>71</sup>

For the commemoration of the fortieth anniversary of *Rerum Novarum* in 1931, Pope Pius XI issued the encyclical *Quadragesimo Anno on Reconstructing the Social Order*. *Quadragesimo Anno* (hereafter QA) was written at a time of economic depression in Western Europe. Marie Giblin underlines the rise of leftist parties while the extreme right was gaining popularity among the middle class. In this context, the Italian political situation was crucial because the Encyclical was issued a few years after the Lateran Pacts of 1929, which ended the seventy-year-long dispute between the Italian government and the Vatican over Papal States. At that time, Mussolini was determined to have fascist control over education and youth, something that Pope Pius XI would not concede.<sup>72</sup> Marie Giblin notes that one year before the publication of the encyclical, there was a growth in the Italian Catholic Action groups even though they were held under surveillance by Mussolini. So, the Encyclical was issued in a context of social turmoil in Italy. It is said that the draft was written by Oswald von Nell-Breuning, a German Jesuit who was given the assignment in strict secrecy by the superior general of the Jesuits.<sup>73</sup> The encyclical letter QA has three main parts: “(1) recollection of *Rerum Novarum* and its impact (1-40); (2) vindication and further development of the social and economic

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<sup>71</sup> Ibid., 137.

<sup>72</sup> Marie J. Giblin, “*Quadragesimo Anno*,” in *The New Dictionary of Catholic Social Thought* (Eds Judith A Dwyer; Minnesota: The Liturgical Press, 1994), 802.

<sup>73</sup> Ibid., 803.

doctrine of *Rerum Novarum* (41-98); and (3) consideration of changes in capitalism and socialism since the time of Leo XIII and a proposal of general remedies (99-148).”<sup>74</sup>

Concerning the poor, Pope Pius XI describes the consequences of the nineteenth century economic situation. Economic development had created a gap between the employee and employers, and people had come to believe that charity can replace the violation of justice (QA 4). That is why Pope Leo XIII and his successors committed themselves to defend the poor and the weak in a more effective way: by combining paternal charity and pastoral constancy (QA 18).

Talking about the role of the civil authority, Pius XI, quoting Leo XIII, underlines that in their duty of protecting the common good, civil authority should consider the weak and the poor (QA 25). In addition, the relation between employee and employer could be improved if through the institutions, the poor participate in associations, which bring together the two classes (QA 29). Leo XIII and his predecessor had chosen as a goal the support of the working class especially those who had become poor (QA 59). They were inspired by Jesus himself who “became poor for our sakes that through His poverty we might become rich, [58] who was poor and in labours from His youth” (QA 126).

Finally, in the development of the option for the poor, both Pope Leo XIII and Pope Pius XI insisted on justice. In no way can charity replace justice. With *Rerum Novarum*, we noted the emphasis on distributive justice for each class of society. Pope Pius XI in *Quadragesimo Anno* places a much greater emphasis on Social Justice. QA has been credited with introducing the concept of social justice into the parlance of official teaching.<sup>75</sup> Social justice demands that each class, employers and workers, provide for the common good.

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<sup>74</sup> Ibid., 804.

<sup>75</sup> Christine Firer Hinze, “Commentary on *Quadragesimo anno* (After Forty Years),” in *Modern Catholic Social Teaching: Commentaries and Interpretations* (Washington: Georgetown University Press, 2005),167.

For the commemoration of the 70<sup>th</sup> anniversary of *Rerum Novarum*, Pope John XXIII issued on May 15, 1961 the Encyclical Letter *Mater et Magistra* (hereafter MM) on Christianity and social progress. The Encyclical has four parts. In the Introduction (1-9), the Pontiff highlights the role of Christianity as a bridge between heaven and earth. He notes that the Church had followed the teachings of Jesus and should also preach by example. Then he underlines the impact of *Rerum Novarum* as a follow up of the teaching of the Church also in the present context.<sup>76</sup>

In the first part of MM (10-50), Pope John XXIII outlines the message of *RN* and its follow up. Leo XIII wrote his Encyclical Letter based on the condition of the workers of his time and it was clearly a response of the Church to the needs of the most vulnerable. John XXIII describes Leo's encyclical as the first complete synthesis of the social principles of the Church. Forty years later, he says, *QA* reiterated the same social principles on the condition of the workers. Then he gives the purpose of *MM*: "Our purpose, therefore, is not merely to commemorate in a fitting manner the Leonine encyclical, but also to confirm and make more specific the teaching of our predecessors, and to determine clearly the mind of the Church on the new and important problems of the day."<sup>77</sup>

The second part of MM (51-121) is the presentation of the teaching of *Rerum Novarum*. The core of the message is the emphasis on the personal initiative of private citizens either working as individuals or as groups. In the third part (122-211), Pope John XXIII addresses some new questions such as the depressed state of agriculture, aid to less

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<sup>76</sup>Pope John XXIII, "*Mater et Magistra* on Christianity and Social Progress," available at [http://w2.vatican.va/content/john-xxiii/en/encyclicals/documents/hf\\_j-xxiii\\_enc\\_15051961\\_mater.html](http://w2.vatican.va/content/john-xxiii/en/encyclicals/documents/hf_j-xxiii_enc_15051961_mater.html) (accessed 03/12/2015)

<sup>77</sup> *Ibid.*, n° 50.

developed areas, justice between nations with different levels of development, the role of the Church, population increase and development, and international cooperation.<sup>78</sup>

The last part of MM (212-257) focused on the building of social relationships in human life. Catholic Social Teaching played a key role in this construction. In the conclusion (258-263), Pope John XXIII invites the recipients of the message to be courageous in co-operating for the realization of Christ's Kingdom in this world, helped by the Church conceived as a Mother and Teacher. The originality of the Encyclical is in the Pope's new attitude and tone in discussing the social dimension of private ownership and a just wage, his openness and dialogue especially in addressing issues of developing nations.<sup>79</sup>

Concerning the poor in MM, Pope John XXIII acknowledged that it is not the first time that the Apostolic See comes out strongly in defence of the interests of the poor (MM 15). The commitment of the Catholic Church for such questions is a response to those who accuse the Church of preaching resignation to the poor and generosity to the rich (MM 16). It is with that same commitment that the Pope invites the public authorities to promote the common good for all (MM 37).

The Pope makes his own the directives of his predecessors who maintain that private ownership is sanctioned by the Gospel and that the rich are invited "to convert their material goods into spiritual ones by conferring them on the poor" (MM 121). Pope John XXIII remarks that developed nations care less when giving aid to the developing nations, and they impose at the same time their own culture (MM 170). He points out the role of Catholic citizens in the developed nations. He invites them to do what they can to

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<sup>78</sup> Michael J. Schultheis, eds., *Our Best Kept Secret: The Rich Heritage of Catholic Social Teaching* (Washington: Center of Concern, 2003), 37-38.

<sup>79</sup> Marvin L. Mich, "Commentary on *Mater et Magistra* (Christianity and Social Progress)," in *Modern Catholic Social Teaching: Commentaries and Interpretations* (Washington: Georgetown University Press, 2005), 191.

“increase the effectiveness of the social and economic work that is being done for the poorer nations” (MM 183).

In conclusion, *MM* is considered to be the first papal document to address issues of international relations and economic development. If Leo XIII had emphasized distributive justice in *RN* and Pius XI social justice in *QA*, *MM* places the stress on equitable distribution and social solidarity between nations.<sup>80</sup> At the heart of international relations is the principle of the common good, which is understood by John XXIII as “all those social conditions, which favour the full development of human personality.” (MM 65)

On September 11<sup>th</sup>, 1962, a month before the beginning of Vatican II, Pope John XXIII delivered a message entitled *Ecclesia Christi, lumen gentium*, which might be translated as ‘the Church of Christ, light for the nations’. In this message the pontiff gave his vision of the Church as follows : ‘En face des pays sous-développés, l’Église se présente telle qu’elle est et veut être : l’Église de tous et particulièrement l’Église des pauvres’.<sup>81</sup> This means that considering the situation of the poorer nations, the Church presents herself and wants to be the Church of all, especially the Church of the Poor. The Church of the Poor will become a famous statement during Vatican II and after Vatican II. Gerald S. Twomey notes that for the first time Pope John XXIII “introduced the theme ‘Church of the Poor’, a topic that stimulated considerable reflection and debate within the *Aula*, especially during the framing of the ‘Pastoral Constitution on the Church in the Modern world’, *Gaudium et Spes*.”<sup>82</sup> The informal group called ‘Jésus, l’Église et les pauvres’ during Vatican II was a response to the wishes of Pope John XXIII to arrive at a

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<sup>80</sup> Marvin L. Mich, “Commentary on *Mater et Magistra* and Social Progress,” 201.

<sup>81</sup> John XXIII, “*Ecclesia Christi, lumen gentium*,” in *La documentation Catholique*, T. LIX, n° 1385, 7 octobre 1962, col. 1220.

<sup>82</sup> Twomey, The “Preferential Option for the Poor,” 60.



Church of the Poor.<sup>83</sup> The next section will analyse the option for the poor in two major Constitutions from Vatican II: *Lumen Gentium* on the Church and *Gaudium et Spes* on the Church in the Modern world.

### **1.3.2 The Option for the Poor in *Lumen Gentium* and *Gaudium et Spes***

The Dogmatic Constitution on the Church *Lumen Gentium* (hereafter LG), issued on November 21<sup>st</sup>, 1964, emphasizes in a few paragraphs the themes of the poor and poverty. Speaking about the visible and spiritual dimensions of the Church, it invites the Catholic Church to follow the steps of its Saviour Jesus who carried out the work of redemption in poverty and oppression. The document quotes many passages of scripture, which refer to Christ's redemption through poverty such as: Phil. 2:6-7; 2 Cor. 8:9; and Lk. 4:18. Following the steps of Jesus the Catholic Church "encompasses with love all who are afflicted with human suffering and in the poor and afflicted sees the image of its poor and suffering Founder." (LG 8)

Referring to the mutual relations of individual bishops to particular dioceses and to the universal Church, *Lumen Gentium* states that bishops have the obligation to safeguard the unity of the faith and to instruct the faithful in love, especially for the poor, the suffering and "those who are undergoing persecution for the sake of justice (cf. Mt. 5:10)." (LG 23) In addition, when bishops offer the Sacrifice of the mass in small, poor or dispersed communities, Christ is present (LG 26). *Lumen Gentium* accentuates the roles of the individual lay person in the proclamation of the Gospel. It affirms that the lay people communally and individually "must diffuse in the world the spirit, which animates those poor, meek and peace-makers whom the Lord in the Gospel proclaimed blessed (cf. Mt. 5:3-9)." (LG 38)

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<sup>83</sup> Pierre Sauvage, "Le rôle des évêques latino-américains in le groupe 'Jésus, L'Eglise et les pauvres' durant le Concile Vatican II," in *Revue théologique de Louvain*, 44, 2013, 560. Also see Christian Tauchner, "« Je désire une Eglise pauvre pour les pauvres » Vers la résurrection d'un idéal," in *Spiritus*, 232 (Septembre 2018), 281-93.

Concerning the Holiness of the Church, the Dogmatic Constitution on the Church reminds us that the Church follows the poor Christ and imitates him by calling the faithful to charity. That is why there are men and women who embrace poverty in imitation of Jesus Christ (LG 42).

In its conclusion, *Lumen Gentium* refers to the Blessed Virgin Mary as the one who stands among the poor and the humble of the Lord. She is united to her Son in the work of salvation “when she presented him to the Lord in the temple, making the offering of the poor (cf. Lk. 2:34-35).” (LG 55;57)

The Pastoral Constitution on the Church in the Modern World *Gaudium et Spes* (hereafter GS) is much more generous in speaking about the poor. This pastoral Constitution was issued in December 7<sup>th</sup>, 1965. According to David Hollenbach it is a major new contribution to the Social Teaching of Church because it “is concerned with all human struggles for life with dignity, with building up the solidarity of the human community, and with the humanization of all human activity and work.”<sup>84</sup> At the very beginning of the document, special attention is paid to the poor. It says: “The joys and the hopes, the griefs and the anxieties of the men of this age, especially those who are poor or in any way afflicted, these are the joys and hopes, the griefs and anxieties of the followers of Christ.” (GS 1)

GS then praises the human intellect, which has contributed over the years to progress in empirical sciences, technology, and in liberal arts. Nevertheless, this human intellect shares in the light of the divine mind and should always be searching for wisdom. For this reason, many nations, which are poorer in material goods and richer in wisdom can be of the greatest advantage to others (GS 15).

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<sup>84</sup> David Hollenbach, “Commentary on *Gaudium et Spes* (Pastoral Constitution on the Church in the Modern World,” in *Modern Catholic Social Teaching: Commentaries and Interpretations* (Washington: Georgetown University Press, 2005), 266.

GS mentions another kind of poverty, which is also difficult to understand. Often, we refer to material, spiritual poverty or poverty as a commitment. The Pastoral Constitution also highlights what it calls ‘cultural destitution’ but does not give any further comment about it (GS 57). Who are those deprived of responsibility or suffer from cultural destitution? If there are those who are culturally poor, this could also be interpreted that there is only one culture. Paradoxically, when talking about the relationship between culture and the Good News of Christ, GS underlines that the “Church has existed through the centuries in varying circumstances and has utilized the resources of different cultures to spread and explain the message of Christ.” (GS 58)

Concerning economic and social life, GS maintains that the dignity and vocation of the human person must be respected. Although production has increased in the so called ‘developed countries’, there are still some disturbing elements. The Pastoral Constitution sometimes notes that economic progress rather than improving the lives of people, “serves all too often only to aggravate them; in some places it even leads to decline in the situation of the underprivileged and to contempt for the poor.” (GS 63)

This contempt for the poor is also dealt with the Pastoral Constitution in the arms race. The arms race is not only a threat to humanity but also an insult to the poor. GS states: “The arms race is one of the greatest curses on the human race and the harm it inflicts on the poor is more than can be endured” (GS 81). Talking about international cooperation in economic matters, the Pastoral Constitution suggests that the welfare of weaker nations should be defended. For this reason, in business dealings with poorer nations, it should be guaranteed that they receive the revenues due from the sale of their home-produced goods. The International Community should coordinate and promote development (GS 86).

GS invites Christians to play a key role in international aid projects, which respect legitimate freedom and friendship towards all. Christians should work for solidarity especially with those living in extreme poverty. It is detailed as follows:

It is all the more urgent, now that the greater part of the world is still suffering from so much poverty: it is as if Christ Himself were appealing to the charity of his followers through the mouths of these poor people. Let us not be guilty of the scandal whereby some nations, most of whose citizens bear the name of Christians, enjoy an abundance of riches, while others lack the necessities of life and suffer from hunger, disease, and all kinds of misery. For the spirit of poverty and charity is the glory and witness of the church of Christ (GS 88).

Consequently, Christians should be in international organizations in order to tackle the problem of poverty. Poverty afflicts many people. This urges the universal Church “to set up some agency in order that both the justice and love of Christ towards the poor might be developed everywhere” (GS 90).

After studying the option for the poor in LG and GS, it is obvious that the first document has few references to the option for the poor than the second when talking about the poor, LG refers mostly to the life of Christ in his poverty and invites Mother Church to do the same. GS is much more generous in its presentation of the option for the poor. Regarding the option for the poor, the principle of solidarity can be considered as the key principle in GS to tackle material poverty. David Hollenbach notes that the content of GS can be grouped under the commitment to justice for the poor.<sup>85</sup> The perspective on social life presented by those two documents was carried forward by the magisterium after Vatican II. The following section will study its development in the papal documents of the Popes after Vatican II.

### **1.3.3 The Option for the Poor in Some Selected Papal Documents after Vatican II**

On the ninetieth anniversary of *Rerum Novarum*, Pope John Paul II issued an encyclical letter *Laborem Exercens* (**LE**) on human work on 15 May 1981. For him, work is what

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<sup>85</sup> Hollenbach, “Commentary on Gaudium et Spes,” 287.

distinguishes human beings from other creatures; each human being must earn his daily bread. Additionally, it is not possible to speak about human work without talking about the human person doing the work.

For this reason, the evaluation of the developments during the ninety years since *Rerum Novarum* in relation to the subject of work shows wide-ranging limits. These gave rise to a trade union and a great burst of solidarity amongst workers to fight against the degradation of the situation of humankind as the subject of work. The Pope states:

It was the reaction against the degradation of man as the subject of work, and against the unheard-of accompanying exploitation in the field of wages, working conditions and social security for the worker. This reaction united the working world in a community marked by great solidarity (LE 8).

The Pontiff praises those movements of solidarity, which should always be opened to dialogue and collaboration with others. He affirms that there must be continued study on the subject of work and especially the subject's living conditions. The Pope calls for the creation of new movements of solidarity for workers and with workers around the world in order to achieve social justice.

The Catholic Church supports the initiative of new movements of solidarity between workers and commits herself to be truly the 'Church of the poor'. Pope John Paul II put it in the following way:

The Church is firmly committed to this cause, for she considers it her mission, her service, a proof of her fidelity to Christ, so that she can truly be the "Church of the poor". And the "poor" appear under various forms; they appear in various places and at various times; in many cases they appear as a result of the violation of the dignity of human work: either because the opportunities for human work are limited as a result of the scourge of unemployment, or because a low value is put on work and the rights that flow from it, especially the right to a just wage and to the personal security of the worker and his or her family (LE 8).

Pope John Paul II also remarks the big gap between rich and poor countries. He

notes:

The gap between most of the richest countries and the poorest ones is not diminishing or being stabilized but is increasing more and more, to the detriment, obviously, of the poor countries. Evidently this must have an

effect on local labour policy and on the worker's situation in the economically disadvantaged societies (LE 17).

It is said that the principle of solidarity mostly emerged from LE. One of the reasons was the tension in Poland between the trade union movement Solidarity (solidarnosc) and the Polish communist government. The Pope was also encouraged by his journeys to Mexico, and Italy in the first year of his pontificate<sup>86</sup>

For the twentieth anniversary of *Populorum Progressio* (hereafter PP), Pope John Paul II issued *Sollicitudo Rei Socialis* (On social Concern) (SRS), on December 30, 1987. For Charles E. Curran, one of the major aspects of the encyclical is the relation between the North and the South, which symbolises the relation between the rich and the poor.<sup>87</sup> Concerning the poor, Pope John Paul II refers to PP as a document expressing the view of Vatican II on the matter. He considers PP as a response to the Council's appeal to opt for the poor. It refers to the situation of poverty and of underdevelopment in which millions of human beings live. It is called the 'griefs and the anxieties of today, especially those who are poor' (SRS 6).

The Pope conducts a brief review of the contemporary world. The first thing he realises is that hopes for development mentioned in PP today appear very far from realisation. Twenty years ago, PP had no illusions, and this is why it limited itself to stressing the seriousness of the situation of poverty especially of the poorer peoples. He also notes that the speed of progress in the developed and developing countries has differed. For him, "the developing countries, especially the poorest of them, find themselves in a situation of very serious delay." (SRS 14) This situation was already

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<sup>86</sup> Patricia A. Lamoureux, "Commentary on *Laborem exercens* (On Human Work), in *Modern Catholic Social Teaching: Commentaries and Interpretations* (Washington: Georgetown University Press, 2005), 391.

<sup>87</sup> Charles E. Curran, Kenneth R. Himes and Thomas A. Shannon, "Commentary on *Sollicitudo Rei Socialis* (On Social Concern)," in *Modern Catholic Social Teaching: Commentaries and Interpretations* (Washington: Georgetown University Press, 2005), 415.

foreseen by Pope Paul VI in PP and he forecasted that under the current economic system, the wealth of the rich would increase, and the poverty of the poor would remain (SRS 16).

Coming to the theological reading of the modern problems, Pope John Paul II underlines the importance of solidarity within each society. Those who are powerful should feel responsible for the weaker, and the weaker also should do what they can for the good of all. Solidarity is a positive sign for our society. The Pope draws attention to another form of solidarity: the solidarity of the poor among themselves. This form of solidarity is appreciated by Pope John Paul II because the poor exercise it without recourse to violence. The duty of the Church is to stand beside the poor and to help them to discern the justice of their requests in the context of the common good (SRS 39).

The Catholic Church has a religious mission to the various fields in which men and women search for happiness. Pope John Paul II highlights the option for the poor as one of the themes and guidelines of the Magisterium in recent years. It is considered a special form of primacy in the exercise of Christian charity. This preference for the poor implies special attention and care for the hungry, the needy and the homeless. Pope John Paul II advises taking into account the realities of the poor when making political and economic decisions. For him, the leaders of nations and the heads of international bodies must always have in mind these realities and should never forget the phenomenon of growing poverty. He notes that the number of poor is increasing not only in developing nations but also in developed countries (SRS 42). He adds: “The motivating concern for the poor - who are, in the very meaningful term, "the Lord's poor" - must be translated at all levels into concrete actions, until it decisively attains a series of necessary reforms” (SRS 43).

In the conclusion of the encyclical, Pope John Paul II again calls for the exercise of solidarity in society. He suggests that the measures taken in economic and political

decisions might be inspired by solidarity and love of the poor. He invites the sons and daughters of the Church to be an example in serving the poor (SRS 46-47). As already mentioned in *Laborem Exercens*, John Paul II raises again critical questions about poverty, development and solidarity in *Sollicitudo rei socialis*. He refocuses attention on the causes of poverty, which are international and national. One of the main causes should be identified in the structure of sin, which implies the relation of individual sin to the social sin.<sup>88</sup>

On the 100<sup>th</sup> anniversary of Pope Leo XIII's *Rerum Novarum* (May 1, 1991), Pope John Paul II issued the Encyclical letter *Centesimus Annus* (CA) on Capital and Labour; on Catholic social teaching. In the presentation of *Rerum Novarum*, the Pope recalls that the poor have a natural right to procure what is required to live through their work (CA 8). Also, where there is question of defending the rights of individuals, the State should pay particular attention to the defenceless and the poor (no 10). He re-reads *Rerum Novarum* in the light of contemporary realities and in connection with the preferential option for the poor. For him the context of *Rerum Novarum* reveals an excellent testimony to the commitment of the Church to the poor. *Rerum Novarum* is an encyclical about the poor and their terrible conditions (CA11).

The third part of his Encyclical letter is dedicated to the year 1989. He characterises it as a year of climax for the countries of Central and Eastern Europe. He says: "In the course of the 80s, certain dictatorial and oppressive regimes fell one by one in some countries of Latin America, Africa and Asia. In other cases, there began a difficult but productive transition towards more participatory and just political structures" (CA 22). On the one hand, the former communist countries in Europe deserve to be helped by

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<sup>88</sup> Charles E. Curran, Kenneth R. Himes and Thomas A. Shannon, "Commentary on *Sollicitudo Rei Socialis* (On Social Concern)," in *Modern Catholic Social Teaching: Commentaries and Interpretations* (Washington: Georgetown University Press, 2005), 424-25.



other countries. On the other hand, the so-called Third World should not be forgotten because they suffer more serious conditions of poverty (CA 28). Furthermore, the poor should not be considered as intruders who try to consume what others have produced. According to John Paul II, what the poor ask for is to share in enjoying material goods and increasing a society that is just and prosperous for everyone. He forecasts that the success of the poor is a great opportunity for moral, cultural and economic growth of all humanity (CA 28).

Reflecting on private property and the destination of material goods, the Pontiff underlines once more the situation of the poor. The poor are trapped by both the lack of material goods, and the lack of knowledge and training. Besides this, development programmes are “cantered on the use not so much of the material resources available but of the "human resources.” (CA 33) The problem of the foreign debt of poorer countries should be redefined if it leads to hunger and despair for entire peoples. He considers, like his predecessor Paul VI, that development is another name for peace. For him, there is a collective responsibility to promote development and to trust the poor, for they have the human potential to improve their condition through work (CA 52).

Considering the individual person as a priority of the Church, he notes that the Church is aware of the social message from the gospels. History has shown many Christians who have distributed their goods to the poor down the centuries as well as holy men and women who founded hospitals and shelters for the poor. The commitment of men and women Religious to the poor was their answer to Christ’s words as written: "as you did it to one of the least of these my brethren, you did it to me" (Mt 25:40). Today’s commitment of the Church to the poor comes from her awareness of the social message of the Gospel. The Church’s preferential option for the poor is not limited to material

poverty but also cultural and spiritual poverty as is her constant tradition.<sup>89</sup> John Paul II underlines new forms of poverty in western countries especially among those on the margins of society such as the elderly and sick, the victims of consumerism, refugees and migrants. He advises taking coordinated measures before it is too late. He suggests the concrete promotion of justice to tackle the phenomenon of poverty and to see the poor as an opportunity rather than as a burden (CA 57-58).

In conclusion, two principles emerge from the social analysis of John Paul II in *Centesimus annus*: subsidiarity and solidarity. As in the previous two social encyclicals, he mentions many times the principles of solidarity. Daniel Finn notes these fifteen times in *Centesimus annus* and he describes it as ‘one of the fundamental principles of the Christian view of social and political organization’ (no 10).<sup>90</sup> The principle of subsidiarity was first underlined by Pope Pius XI in *Quadragesimo anno* when he spoke of the relation of individuals and smaller groups with larger or national governments. He considers it wrong to take from individuals what they can achieve by their own initiative in order to give it to the community.<sup>91</sup>

On 14 September 1995, Pope John Paul II launched in Yaoundé (Cameroon) the Post-synodal Apostolic Exhortation *Ecclesia in Africa on the Church in Africa and its Evangelisation Mission towards the year 2000* (hereafter EA). The document is the result of the reflection of the synod Fathers on the challenges and future prospects of evangelization in Africa (EA 1). Quoting the African Synod Fathers, Pope John Paul II presents the overall situation in Africa as follows:

In almost all our nations, there is abject poverty, tragic mismanagement of available scarce resources, political instability and social disorientation. The results stare us in the face: misery, wars, despair. In a world controlled by

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<sup>89</sup> Also see CATECHISM OF THE CATHOLIC CHURCH, (Dublin: Veritas, 1994), no 2444.

<sup>90</sup> Daniel Finn, “Commentary on *Centesimus annus* (On the Hundredth Anniversary of *Rerum novarum*),” in *Modern Catholic Social Teaching: Commentaries and Interpretations* (Washington: Georgetown University Press, 2005), 449.

<sup>91</sup> *Ibid.*

rich and powerful nations, Africa has practically become an irrelevant appendix, often forgotten and neglected (49) (EA 40)

Besides, there is a contrast between the rich natural resources in Africa and the material poverty (EA 42). Nevertheless, he notes a number of positive achievements of the Church in Africa:

I note with satisfaction that the Church in Africa, faithful to its vocation, stands resolutely on the side of the oppressed and of the voiceless and marginalized peoples. I strongly encourage it to continue to bear this witness. The preferential option for the poor is “a special form of primacy in the exercise of Christian charity, to which the whole Tradition of the Church bears witness ... The motivating concern for the poor — who are in the very meaning of the term ‘the Lord’s poor’ — must be translated at all levels into concrete actions, until it decisively attains a series of necessary reforms” (52) (EA 44).

In spite of the effort of the Church in Africa to tackle poverty, social and political difficulties still remain. Many Africans are still in the “grip of famine, war, racial and tribal tensions, political instability and violation of human rights.” There are problems of refugees and displaced people (EA 51). For those reasons, Pope John Paul II promotes integral human development especially the development of the poorest and most neglected in the community.

The Church should commit herself by following the spirit of Jesus who has been anointed to preach Good News to the poor (EA 68). The Pope invites the

sister Churches all over the world to be more generous to the Pontifical Mission Aid Societies so that, through their structures of assistance, they will be able to offer to poorer Dioceses economic assistance dedicated to projects that will generate resources, with a view to increasing the financial self-reliance of the Churches (207) (EA 104).

At the International level, Pope John Paul II stresses on the fact that African Nations are among the most disadvantaged materially because people are struggling to rise from poverty and misery (EA 104). The Pope asks for more attention to the cries of poor nations. He appeals for help in what he calls the ‘areas of particular importance’ such as malnutrition, the widespread deterioration of living, the problem of educating youth,

lack of elementary health, the terrible scourge of AIDS, the burden of international debt, arms trafficking, the refugee crisis and displaced persons (EA 114).

John Paul II repeats the message of the Synod Fathers concerning the tragic scourge of AIDS, which adds more suffering to the situation of widespread poverty (EA 116). He asks for a serious commitment for better conditions of greater justice in the continent. He also expresses the concern of the Church in relation to the burden of the international debt on poor nations. He calls for the International Monetary Fund, the World Bank and all foreign creditors to ease the debts of the African nations (EA 120). Finally, the Church in Africa is invited to put solidarity into practice by her openness and her contribution to a true culture of peace (EA 138), by charitable work on behalf of the poor and the neediest (EA 139).

At Ouidah in Benin on November 2011, Pope Benedict XVI launched the Apostolic Exhortation *Africae Munus* on the *Church in Africa in service to Reconciliation, Justice and Peace* (hereafter AM). The Church in Africa is called ‘to live reconciliation between individuals and communities and promote Peace and Justice in truth for all’ (AM 1). The Church in Africa must help to create a just society in the Spirit of the Beatitudes (AM 28).

For Benedict XVI and the Synod Fathers, the Church in Africa should work for a new horizon of justice because wherever the poor are consoled and admitted, the kingdom of God is manifest (AM 26). It is read: “In the spirit of the Beatitudes, preferential attention is to be given to the poor, the hungry, the sick – for example, those with AIDS, tuberculosis or malaria – to the stranger, the disadvantaged, the prisoner, the immigrant who is looked down upon, the refugee or displaced person (cf. Mt 25:31-46)” (AM 27).

The Pope and the Synod Fathers ask the Church in Africa to stand for an economy that cares for the poor and to fight against the unjust order (AM 79). That unjust order

‘under the pretext of reducing poverty, has often helped to aggravate it.’ In spite of surplus natural resources, people are condemned to live in chronic poverty. The Mission of the Church in Africa is to combat the unjust order, which exploits poor people with the complicity of those in power in Africa.

Pope Benedict XVI mentions the problem of migrants, displaced people and refugees. The millions of migrants, displaced persons and refugees shows the magnitude of different types of poverty. He attributes the causes to the deficiencies of public administration. Many of those who try to cross deserts and seas are victims of violence and exploitation, often fleeing the threat of imprisonment and even death. Some States have responded to this chaotic situation with repressive legislation. The Pope appeals for compassion and generous solidarity (AM 84).

The Pope makes a special demand to permanent deacons to pay much more attention to the sick, the frail and the poor. They should follow the example of Saint Stephen and Saint Vincent (AM 116). He does the same for the catechists. He invites them to welcome people without distinction, rich and poor (AM 127). The Pope invites the lay men and women to put into practice the preferential option for the poor in their daily life.

The document pleads as follows:

Your work enables you to participate in the work of creation and to serve your brothers and sisters. Acting in this way, you will be “the salt of the earth” and “the light of the world”, as the Lord asks of us. In daily life, put into practice the preferential option for the poor, whatever your position in society, in accordance with the spirit of the Beatitudes (cf. Mt 5:3-12), so as to see in them the face of Jesus who calls you to serve him (cf. Mt 25:31-46). (AM 130).

#### **1.4 THE OPTION FOR THE POOR AT MEDELLIN AND PUEBLA**

This section focuses especially on two main documents from the second, and third General Conferences of the Bishops of Latin America and the Caribbean (hereafter CELAM). After presenting the context in which the conferences were held, we analyse each document to identify the passages on the option for the poor. For example, among

the sixteen documents of Medellín, attention is given to number thirteen on ‘Poverty of the Church’. In the Puebla document, this study presents chapter one of part four on ‘A preferential option for the poor’.

#### **1.4.1 Medellín and the Option for the Poor**

From August 26<sup>th</sup> until September 9<sup>th</sup> of 1968, the Latin American Episcopal Conference (CELAM) met at Medellín, Colombia.<sup>92</sup> The Medellín meeting was held during a year of turmoil.<sup>93</sup> Joe Egan quoting Mark Kurlansky speaks of 1968 as ‘the year that rocked the world.’<sup>94</sup> Across the world, there was a witness of a series of revolutionary events such as: the Vietnam War; the civil war in Nigeria as Biafra sought to secede from the rest of the country; the images of repression in the Soviet Union and the students’ revolts in Paris; the death of iconic figures such as Martin Luther King and the assassination in the US of Robert Kennedy, the great civil rights leader.<sup>95</sup>

In Latin America, it was a time of severe poverty and injustice and a period in which military regimes became recurrent.<sup>96</sup> Previously, there has been a Cuban revolution (1959) based on Marxism, which preaches the equality between people and the masses. Christians and Marxists everywhere in Latin America were fighting the same evil: unjust social structures. It led to the radicalisation of the Latin American theologians who “equated the Gospel with socialist political project, the so-called Christians for Socialism, and the consequent persecution of pastoral agents by the military in Brazil, Chile, Argentina, Uruguay, Paraguay, El Salvador and Guatemala.”<sup>97</sup> It is within this context

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<sup>92</sup> In this writing, the Spanish acronym CELAM will be used to designate the Latin America Episcopal Conference in Spanish *Conferencia Episcopal Latinoamericana*.

<sup>93</sup> Mario I. Aguilar, “The Kairos of Medellín,” in *Movement or Moment: Assessing Liberation Theology Forty Years after Medellín* (Eds. Patrick Claffey and Joe Egan; Oxford: Peter Lang, 2009), 12.

<sup>94</sup> Joe Egan, “From Moment to Moment: Liberation Theology and the Demise of Neolithic Man.” in *Movement or Moment: Assessing Liberation Theology Forty Years after Medellín* (Eds. Patrick Claffey and Joe Egan; Oxford: Peter Lang, 2009), 210.

<sup>95</sup> Ibid.

<sup>96</sup> Ibid.

<sup>97</sup> Aguilar, “The Kairos of Medellín,” 14-15. Also see Rodolfo Cardenal, “Salvador (La Tdl au),” in *Dictionnaire Historique de la Théologie de la Libération* (Namur : Éditions jésuites, 2017), 415-18.

that CELAM gathered and reflected on “the Church in the present transformation of Latin America in light of the Second Vatican Council.”<sup>98</sup>

At the end of their meeting, a series of sixteen texts were published. These texts are known as the ‘Medellín Documents’.<sup>99</sup> The primary objective of CELAM was to implement the insights of Vatican II. Curt notes: “It is not an accident that they entitled the ‘Medellín Documents’: *The Church in the Present-Day Transformation of Latin America in the Light of the Council.*”<sup>100</sup> The Spanish version of the final documents that we are using in this study has sixteen texts and is divided into two major parts: the first part is on Human Promotion. It consists of nine different texts laid out in the following order: Justice; Peace; Family and demography; Education; Youth; Ministry at the grassroots; Ministry to elites; Catechism; and Liturgy. The second major part, made up of seven documents, focuses on the visible Church and its structures. The seven documents in this part, extending from ten to sixteen, are listed in the following order: Lay movements; Priests; Religious; Training of the clergy; Poverty of the Church; Pastoral ministry; and Social Media. Marcos McGrath identifies three areas in the ‘Medellín documents’ instead of two: human promotion; evangelization and growth in faith; the visible church and its structures.<sup>101</sup> The following study focuses on the option for the poor especially in the thirteenth document on ‘Poverty of the Church.’<sup>102</sup>

The document on ‘Poverty of the Church’ begins by presenting the social reality of the Church of Latin America. It then continues by presenting the doctrinal motivation

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Fortunato Mallimaci, “Argentine (La Tdl en),” in *Dictionnaire Historique de la Théologie de la Libération* (Namur : Éditions jésuites, 2017), 54-9.

<sup>98</sup> Ibid.

<sup>99</sup> Cadorette Curt, “Medellín,” in *The New Dictionary of Catholic Social Thought* (Ed. Judith A. Dwyer; Collegeville: The Liturgical Press, 1994), 590.

<sup>100</sup> Ibid., 592.

<sup>101</sup> Marcos McGrath, “The Conferences and the Latin American Church,” in *Born of the Poor: The Latin American Church since Medellin* (Ed. Edward L. Cleary; London: University of Notre Dame, 1990), 77.

<sup>102</sup> See II CONFERENCIA GENERAL DEL EPISCOPADO LATINOAMERICANO, “Documentos finales de Medellín,” available at <http://www.ensayistas.org/1critica/liberacion/medellin/> (accessed 06/04/2016)

and suggesting some pastoral guidelines. Concerning the option for the poor, CELAM states that they cannot be indifferent to the critical situation of material poverty of their people. It is not only material poverty but extreme poverty, which has become misery (no 1). Bishops remarked that people are complaining about the lifestyle of Clergy and religious.

Poor people suspect that the clergy and religious are allies of the rich. The reason for this is that the lifestyle of the clergy and Religious is far superior to the other inhabitants of the neighbourhood in which they live (no 2). CELAM acknowledges that there are some situations where people at the grassroots feel that their bishops or priests and religious do not identify with them. Nevertheless, this general overview of the situation should never make people forget the sacrifices of many priests and religious who work in very difficult conditions for and with the poor (no 3). CELAM document on poverty highlights three kinds of poverty: material poverty as a lack of goods; spiritual poverty as an attitude of openness to God and non-attachment to goods; poverty and commitment, which imply solidarity and commitment to the poor (no 4).

Having identified the various categories of poverty, CELAM then went ahead to stating what the mission of the poor Church for the poor entails. According to CELAM, material poverty should be denounced as unjust and as leading to sin. Spiritual poverty as an attitude of dependence on God should be preached and lived. Besides, evangelical poverty should be followed by all the members of the Church (no 5-6). The Church of Latin America needs to listen to the cries of the poor; she should put into practice the value of solidarity with the poor. Evangelisation of the poor should also lead to sharing material goods with them. This must be done in order to denounce injustice and oppression. Human promotion should be the leitmotiv of the Church in her actions towards the poor (no 7-11). Priests should bear witness to poverty and be detached from



material goods; Religious communities must do the same as they have a special vocation to poverty. CELAM also invites everyone to a sincere conversion, changing from the mentality of individualism and leading to concern for the common good (12-17).

In conclusion, even though the intention of CELAM was to implement Vatican II at Medellin, Medellin went far beyond Vatican II. The series of documents of Medellin were conceived from the socioeconomic situation of Latin America such as the context of material poverty and injustice. The Medellin documents were theological texts rather than scientific studies, a theology written in the light of the socioeconomic context of Latin America.<sup>103</sup> The principle of solidarity mentioned by CELAM to tackle poverty and injustice could be considered as the continuity of Vatican II and the social teaching of the Church in general. The newness of the documents on ‘Poverty of the Church’ is the call to the leaders of the Church to be themselves witnesses of poverty and to work with the poor. It was an invitation to Priests, Religious and Bishops to change their ostentatious lifestyles. Curt acknowledges that this approach of the Catholic Church in Latin America is new because both church and state in Latin America were extremely hierarchical and conservative.<sup>104</sup>

For the current section, we have chosen to study the thirteenth document on ‘Poverty of the Church’. It should, however, be featured that the document on Justice and Peace does also explore similar themes as the one on Poverty. Indeed, the document on Peace goes even further into such issues. This document brings to the fore the tensions in Latin America such as: tension between classes and internal colonialism (no 2-7); international tensions and external neo-colonialism (no 8-10); tensions between countries

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<sup>103</sup> Ibid., 592.

<sup>104</sup> Ibid., 590.

in Latin America (no 11-13), which engender poverty resulting in injustices against the common people.

Considering the colonial history of the Church in Latin America, the document on the poverty of the church indicates a deep change of attitude and policy.<sup>105</sup> The Post-Medellin period showed a sense of optimism in the Latin American Church. Many Christians, whether bishops, priests or religious, all engaged in an effort to reshape and make society a home fit for everyone. Such commitment led to a reaction from conservatives and some members of the upper classes who thought that the Church had been infiltrated by Marxists. In the meantime, many conservative bishops distanced themselves from the teaching of Medellin. On account of this, there was a growing tension between the conservative and progressive wings of bishops in Latin America. This tension was addressed in 1979 at Puebla Conference in Mexico. The next section is dedicated to the document from Puebla. Our study will focus especially on the first chapter of part four of the document entitled “A preferential option for the poor”<sup>106</sup>.

#### **1.4.2 Puebla and the Preferential Option for the Poor**

Eleven years after the Conference of Medellin in 1979, CELAM gathered at Puebla in Mexico for their third general conference on ‘Evangelization at the present and in the future of Latin America’. Pope John Paul II, who was present at the beginning of this meeting, emphasised this anniversary of Medellin. He invited CELAM to take the conclusions of Medellin conference as the starting point of their gathering and to be attentive to the incorrect interpretations that had sometimes resulted. He also invited the

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<sup>105</sup> Ibid., 593.

<sup>106</sup> CELAM, *Puebla, Evangelisation at present and in the future of Latin America: Conclusions* (Official English Edition; Washington: National Conference of Catholic Bishops, 1979), no 1134-1165.

bishops of Latin America to look closely at the Apostolic Exhortation *Evangelii Nuntiandi* (*Evangelization in the modern Word*) of Paul VI issued few years before Puebla.<sup>107</sup>

The structure of John Paul II's message highlighted some solutions to help overcome what was identified previously by Curt as tension between the conservatives and progressives after Medellin. John Paul II urged the bishops of Latin America to be teachers of truth; signs and builders of unity; and defenders and promoters of human dignity. Responding to the invitation of John Paul II and continuing what was initiated at Medellin, CELAM described the Church of Latin America as a missionary Church serving the cause of the poor. This was neatly articulated in the fourth part of the document, such as the preferential option for the poor and young people; the Church, as the builder of a pluralistic society; and the Church working on behalf of poor people.

The document of Puebla dedicated thirty-two numbers (1134-65) to the situation of poverty. The majority of people in Latin America lacked elementary goods for a healthy human existence, people were both spiritually and materially marginalized in some urban areas and women were oppressed. Commitment to the poor constituted the heart of evangelization for the bishops during this conference because for them, it helps the poor to fulfil themselves as children of God. The bishops acknowledged that the Church of Latin America needed constant conversion and purification. She should identify herself with the poor Christ and her own poor.

Hence, the entire Church of Latin America, on her journey of identification with the poor Christ was encouraged to continue to commit herself to the cause of the poor, the vulnerable and those at the economic margins of the society. In line with the previous Conferences, the bishops called on the poor to join their efforts, creatively cooperate with

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<sup>107</sup> John Paul II, "Opening address at Puebla Conference" in *Puebla and Beyond: Documentation and Commentary* (Ed. John Eagleson; Trans. John Drury; New York: Orbis, 1979), 57-58.

each other so as to get themselves out of the dehumanising conditions and so reclaim their rights. The Church had to deduce practical ways in bringing to fruition these ideas. She began by involving the poor in Small Christian Communities and the rise of those Christian communities have helped the Church to discover the potential of the poor to evangelize. Between Medellin and Puebla, the Church of Latin America has experienced persecution because of her prophetic denunciations. The Church in Latin America has been accused of preaching dangerous and erroneous Marxist ideology. As a result of all this, tensions inside and outside the Church arose creating an unfavourable atmosphere for evangelisation.

Following the steps of Jesus in his solidarity with the poor, the Church of Latin America took concrete actions. The Bishops continued in the spirit of Medellin by condemning extreme poverty, preaching against the mechanism that enriched the fortunate few and impoverished masses, acknowledging the solidarity of other Churches and lucidly stating that the preferential option for the poor does not mean exclusive love for the poor.

Finally, the originality of the approach of Puebla can be identified in the humility of the bishops in acknowledging that the Church has not done enough to protect the poor. For Sobrino, that was not sufficient because in the final document, there is a lack of sincere acknowledgement of the Church's own mistakes, errors and sins.<sup>108</sup> While at Medellin, the bishops of Latin America denounced the extreme situation of poverty in Latin America and asked for liberation, at Puebla, there was a shift in emphasis. For the latter, denunciation of injustices by the Church was ongoing and the message of the bishops showed that they were prepared to face the consequences as witnesses of Justice.

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<sup>108</sup> Jon Sobrino, "The significance of Puebla for the Catholic Church in Latin America" in *Puebla and Beyond* (Ed. John Eagleson and Philip Scharper; Trans. By John Drury; New York: Orbis, 1979), 298.

That happened in the concrete experience of martyrdom in the Latin American Church even though it is omitted in Puebla's document.<sup>109</sup> The common principle at Medellin and Puebla is that of solidarity with the poor; solidarity in imitation of Jesus who became one of the poor through his birth, life, passion and death where poverty found its maximum expression. This theme of solidarity will emerge in the concluding document of the fifth General Conference of the Bishops of Latin America and the Caribbean called the 'Aparecida document.' Aparecida is the name of the most important Marian shrine in Brazil. It is there that the meeting was held. The Aparecida Document will be analysed in the fourth chapter on Pope Francis as he was one of the major architects of this document.

## **1.5 THE JESUITS' CONSTITUTIONS AND POVERTY, THEIR COMMITMENT FOR JUSTICE AFTER VATICAN II**

### **1.5.1 Who are the Jesuits?**

The Society of Jesus (Jesuits) is the name given to the religious missionary order founded in 1538 by Ignatius of Loyola<sup>110</sup> and his companions. Together they offered themselves to Pope Paul III in 1538 to be at his service. The following year (1539), they were recognised as a religious order and selected a superior.<sup>111</sup> Ignatius was chosen as the first superior general of the Order. Then the plan to give a juridical structure to the Society was initiated.

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<sup>109</sup> Sobrino, "The significance of Puebla for the Catholic Church in Latin America," 299.

<sup>110</sup> He was born in Spain in 1491 and died in Rome on 31 July 1556. He spent his youth in the service of the treasurer of the royal house of Castile. He joined the army and was injured at the battle of Pamplona in 1521. During his recovery he read the life of Christ written by Ludolph of Saxony and this led to his conversion. He spent a year of retreat at Manresa and wrote the main points of what would become his *Spiritual Exercises*. He went on pilgrimage to Jerusalem, spent more than a decade studying in Paris where he encountered those who would become his first companions in the religious life. They were ordained in 1537. He spent the rest of his life running the Order in Rome. (Cf. Michael Walsh (ed.), *Dictionary of Christian Biography* (London: Continuum, 2001), 639-640; John J. Delaney and James Edward Tobin, eds., *Dictionary of Catholic Biography* (London: Robert Hale, 1962), 585.)

<sup>111</sup> André Ravier, *Ignatius of Loyola and the Founding of the Society of Jesus* (Trans. By Maura Daly, Joan Daly and Carson Daly; San Francisco: Ignatius Press, 1987), 13.

Ignatius and his companions began the first stage of a first draft of what is called the ‘Formula of the Institute.’<sup>112</sup> This formula is the fundamental charter of the Society of Jesus. It “became a document of papal law when it was incorporated into the bull *Regimini militantis Ecclesiae*, dated September 27, 1540, by which the Society was approved.<sup>113</sup> From that time, it has been considered as the ‘fundamental Rule’ of the order, containing the whole substance of its legislation.”<sup>114</sup> By then the Constitutions had become the guide and centre of the spirituality of the Society of Jesus. This last section on the option for the poor in the Society of Jesus after Vatican II responds to the appeal of Pope John XXIII at the beginning of Vatican II to conceive the Church as the Church of the Poor.<sup>115</sup> But prior to this, the founder of the Jesuits had already emphasised the life of evangelical poverty that he followed himself and it became part of Jesuit spirituality.

## **1.5.2 Saint Ignatius, the Jesuits’ Constitutions and the Option for the Poor**

### ***1.5.2.1 Saint Ignatius of Loyola and Poverty***

In the introduction to his spiritual commentary of the Constitutions of the Society of Jesus, the Jesuit André de Jaer, studies step by step the life of evangelical poverty as lived by

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<sup>112</sup> Reflecting on the distinctiveness of the Society of Jesus, John W. O’Malley writes the following about the formula of the Institute: “In 1539, the ten future founders of the Society deliberated for several months in drawing up a statement detailing the features of the order for which they hoped to receive papal approval. They called the resulting document their Formula Vivendi, their ‘Plan of Life,’ which later came to be known as the Formula of the Institute.” (O’Malley John W., “The distinctiveness of the Society of Jesus,” in *Journal of Jesuit Studies* 3 (2016), 2.)

<sup>113</sup> The Society of Jesus will be suppressed in 1773 by Pope Clement XIV. It will later be restored by the decision of Pope Pius VII, promulgated on August 7, 1814. In his introduction to the latest version of *The Cambridge Encyclopedia of the Jesuits*, the Jesuit Thomas Worcester acknowledges that Pope Pius VII matters a lot for the Society of Jesus because without him we will not be speaking about them today. Worcester describes the expulsions and suppression of the Jesuits in 1773 as follows: “These kinds of events (expulsions and suppression) recall the fact that the Society of Jesus has not always been appreciated or well received. The extremely varied reception of the Society of Jesus is surely one of its characteristics: Jesuits have been used as scapegoats for just about everything wrong with culture and society; some Jesuits have been killed for simply being Jesuits, while others have been revered as saints and heroes in their lifetimes, whether or not they are ever officially beatified or canonised.” (Thomas Worcester, “Introduction,” in *The Cambridge Encyclopedia of the Jesuits* (Cambridge: Cambridge University Press, 2017), 3.)

<sup>114</sup> Candido de Dalmases, *Ignatius of Loyola, Founder of the Jesuits: His Life and Work* (Trans. Jerome Aixala, India: The Institute of Jesuit Sources, 1983), 232.

<sup>115</sup> John XXIII, “Ecclesia Christi, lumen gentium” in *La documentation Catholique*, T. LIX, no 1385, 7 October 1962, col. 1220.

Ignatius and his first companions. This section will make use of this work.<sup>116</sup> The first stage of his study focuses on the life of Saint Ignatius when he was a convert and pilgrim from 1521 to 1524. During this time, Ignatius was convalescing and reading the lives of the Saints and contemplated Jesus Christ's life in the Gospel. André de Jaer states: "He chose to live in total poverty, dressed in sackcloth, begging for necessities from day to day, often enough finding a place to sleep in hospitals among the poor and less fortunate."<sup>117</sup>

In addition, when Ignatius started to compose the *Spiritual Exercises* during the time of convalescence, he relied on his own experiences. De Jaer asserts:

The great contemplations of the kingdom, the Standards, and the Third Degree of Humility, along with the colloquies asking to be received under the standard of Christ as he traversed the road of a poor and humble life – all recapitulated the evangelical development that he himself had gone through. The stress on following Christ and imitating him in poverty remains strong throughout the book of the Exercises (SE 91, 98, 114, 116, 146, 147, 189, 281).

Ignatius gives advice to his followers to make the *Spiritual Exercises* and to live a radical poverty during their experiences in the course of formation. In the *Spiritual Exercises*, poverty is linked with humility. Michael Ivens observes that for Ignatius, "there is no actual poverty where there is no degree of actualized humility. As with poverty, the choice of humility as a way of life is rooted in deep personal desires to become free from egocentricity and to enter upon a relationship with God."<sup>118</sup> This conception of poverty as humility draws our attention to the lifestyle of Pope Francis who is a Jesuit and one of the figures of our study in this thesis. Can we affirm that his lifestyle (simplicity, humility and his option for the poor) is strongly influenced by Saint Ignatius's spirituality and the *Spiritual Exercises*? We will examine this question in the fifth chapter of our thesis.

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<sup>116</sup> André de Jaer, *Together for Mission: A spiritual commentary on the constitutions of the Society of Jesus* (trans. Francis C. Brennan; Saint Louis: The Institute of Jesuit Sources, 2001), 123-127.

<sup>117</sup> *Ibid.*, 123.

<sup>118</sup> Michael Ivens, "Poverty in the Constitutions and other Ignatian Sources," in *The Way*, Supplement 61, 1988, 81.

The second stage of De Jaer's commentary presents the life of Ignatius when he was a student in Spain and in Paris (1524-1534). Ignatius lived a modest lifestyle based on confidence in God and on sharing what he received with others around him. For De Jaer, Ignatius "came to accept that studies require the engagement of the whole person, and therefore he agreed to temper the radical extremes of his poverty at least to receive burses that would enable him to live in a 'college' without having to beg from day to day."<sup>119</sup>

The third and fourth stage of Ignatius's life is from 1534 until 1547 and beyond. Ignatius and his companions chose to live closely to the spirit of the Gospel. André de Jaer writes:

At Montmartre on August 15, 1534, they all commit themselves to live as poor priests of Jesus Christ, to preach in poverty. Content to live off the alms freely given after they have performed their apostolic ministries, they would remain close to the poor and would live without any fixed revenues.<sup>120</sup>

In 1547, the Society of Jesus began an active involvement in educational pursuits. The Institution quickly spread throughout Europe. Managing the increased revenues of the colleges became a constant preoccupation for Ignatius. At that time, Ignatius addressed a letter to the scholastics in Padua urging love of poverty. In this letter, Ignatius stressed again the connection between preaching the Gospel and the poor.<sup>121</sup> André de Jaer gives the following conclusion on poverty in Saint Ignatius's life:

We can conclude from our consideration of these four periods in the life of Ignatius that amid quite varied socioeconomic and apostolic circumstances, he was always careful to preserve three essential elements of poverty. The first was to give priority to dependence on God and confidence in him alone (no possessions). Second, the word was to be preached without recompense (gratuity of ministries). Third, it was important to live in close contact and solidarity with the little ones, the poor, and those stricken by the misfortunes of life."<sup>122</sup>

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<sup>119</sup> Ibid., 124.

<sup>120</sup> Ibid.

<sup>121</sup> Ibid., 126.

<sup>122</sup> Ibid., 127.



The articulation of what is expressed in the life of Ignatius on poverty is found in the part IV of the Constitutions of the Society of Jesus. The following section focuses especially on poverty in the Constitutions of the Society of Jesus.

### ***1.5.2.3 Poverty in the Constitutions of the Society of Jesus***

In the Constitutions of the Society of Jesus, part four on the personal life of the members concentrates its second chapter on ‘what pertains to poverty and its consequences’.<sup>123</sup> According to the Jesuit, Michael Ivens, two kinds of poverty can be identified in the Constitutions of the Society of Jesus: poverty as mendicancy, and poverty and common life.<sup>124</sup>

Concerning poverty as mendicancy, we read what follows:

The members should be ready to beg from door to door when obedience or necessity requires it. Some person or persons should be designated to request alms by which the members of the Society may be supported. These persons should ask for them simply for the love of God our Lord.<sup>125</sup>

Commenting on this number from the Constitutions, George Ganss notes that Ignatius’s esteem for the virtue of poverty reminds us of Saint Francis of Assisi’s love of so called ‘Lady Poverty’. He states:

Among many reasons for this esteem of Ignatius, two stand out: (1) his enthusiastic embracing, already in his first conversion, of the mendicant spirit of St. Francis and St. Dominic which he found in Ludolph’s *Life of Christ* and in Jacobus’s *Flos Sanctorum* and (2) his antipathy to the prevalent avarice of so many of his contemporary ecclesiastics which was scandalizing and damaging the Church so much.<sup>126</sup>

For Michael Ivens, what should be understood through poverty as mendicancy is above all the relationship to money and material possessions. In addition, poverty should involve a real trust in providence, gratuity of ministries and also the radical mendicant

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<sup>123</sup> Saint Ignatius of Loyola, *The Constitutions of the Society of Jesus* (Trans. George E. Ganss; Saint Louis: The Institute of Jesuit Sources, 1970), n° 553-581.

<sup>124</sup> Michael Ivens, “Poverty in the Constitutions and other Ignatian Sources,” in *The Way*, Supplement 61, 1988, 76-87.

<sup>125</sup> *Ibid.*, n° 569.

<sup>126</sup> See George Ganss, “An Introduction and a Commentary,” in *The Constitutions of the Society of Jesus*, (St. Louis, Institute of Jesuit Sources, 1970), 251.

status of apostolic residences.<sup>127</sup> That is why Ignatius defines poverty as the ‘strong wall of the religious life’, the ‘defence and rampart, which God our Lord inspired religious institutes’.<sup>128</sup>

Talking about poverty and common life, Michael Ivens refers to the definition in the Constitutions of what is named “ordinary (communis)”.<sup>129</sup> For him, this regards a common lifestyle of Jesuits, which should be simple, without superfluities. It appears in the Constitutions as follows: “What pertains to food, sleep, and the use of the other things necessary or proper for living, will be ordinary (...)”<sup>130</sup> The concern of Saint Ignatius is that food should be adequate and avoid extravagance, that buildings should be salubrious and that no pains should be spared in providing for the sick.

The idea of Saint Ignatius is that a Jesuit’s ordinary life should be close to the people on the ground. The way that they dress and eat should not be different from the ordinary way of the common people. This lifestyle makes their relationship and familiarity with people easier. Finally, common life is the life of the poor.<sup>131</sup> Quoting Saint Thomas Aquinas, another Jesuit Antonio M. de Aldama calls it “manners of living (*modi vivendi*).”<sup>132</sup> This way of life implies renunciation of the ownership of goods. That means an evangelical poverty, which is interconnected with their mission in the world. This will be renewed by the Society of Jesus after Vatican II at their 32<sup>nd</sup> General Congregation, where number 257 of decree 12 on poverty states:

In recent times and especially since the Second Vatican Council, the Church, her families of religious, indeed the whole Christian world have been striving for deeper understanding and new experiential knowledge of evangelical poverty. This Congregation, like its predecessor, has tried

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<sup>127</sup> Ivens, “Poverty in the Constitutions and other Ignatian Sources,” 78.

<sup>128</sup> Saint Ignatius of Loyola, *The Constitutions of the Society of Jesus*, n° 553.

<sup>129</sup> *Ibid.*, 81.

<sup>130</sup> *Ibid.*, no 580.

<sup>131</sup> *Ibid.*, 86.

<sup>132</sup> Thomas Aquinas, *Summa contra gentiles*, III, Chaps 31 and 35 cited by Antonio M. de Aldama, *The Constitutions of the Society of Jesus: An Introductory commentary on the constitutions* (Trans. Aloysius J. Owen; Rome: Centrum Ignatianum Spiritualitatis, 1979), 226.

earnestly to enter into this movement and to discern its implications for our society.<sup>133</sup>

In the following section we analyse especially decrees 4 and 12 of the documents of this 32<sup>nd</sup> General Congregation of the Society of Jesus on the service of faith and the promotion of Justice, and on poverty.

### **1.5.3 Jesuits' Renewal of Social Justice after Vatican II**

Just after Vatican II, the Jesuits were animated by the same spirit to implement the Second Vatican Council teaching on Justice. David Tombs mentions that Pedro Arrupe (at that time Father General of the Society of Jesus) met with all the Jesuit Provincials at Rio de Janeiro in May 1968 and expressed his intention to be committed to the needs of the Poor.<sup>134</sup> A few years later, he convoked the 32<sup>nd</sup> General Congregation (1974-75) to revive the implementation around the world of the questions of Justice and the option for the Poor. Pope Francis and Jon Sobrino, two Jesuits who are at the central core of this thesis were members of that meeting. The next part of our study will focus on the commitment of Jesuits to the Poor after Vatican II.

#### ***1.5.3.1 Renewal of the Commitment for Justice and for the Poor at the 32<sup>nd</sup> General Congregation of the Society of Jesus***

The 32<sup>nd</sup> General Congregation of the Society of Jesus took place from the 3<sup>rd</sup> December 1974 until March 7, 1975. The purpose of that meeting was to reflect on Jesuit identity in today's world. One of the main questions was: what is it to be a companion of Jesus today? The answer was: "it is to engage, under the standard of the cross, in the crucial struggle of our time: the struggle for faith and that struggle for justice, which it includes."<sup>135</sup> The

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<sup>133</sup> Society of Jesus, *Documents of the 31<sup>st</sup> and 32<sup>nd</sup> General Congregations of the Society of Jesus* (Missouri: The Institute of Jesus Sources, 1974-75), 486.

<sup>134</sup> David Tombs, "Latin American Liberation Theology" in *Movement or Moment: Assessing Liberation Theology Forty Years after Medellin* (Eds. Patrick Claffey and Joe Egan; Oxford: Peter Lang, 2009), 32.

<sup>135</sup> Society of Jesus, *Documents of the 31<sup>st</sup> and 32<sup>nd</sup> General Congregations of the Society of Jesus*, 401.

struggle for faith and justice emerged from many requests from the Jesuits across the world asking for clear decisions and guidelines for their mission today.<sup>136</sup>

Decree 4 on the service of faith and promotion of justice is the most important document. The Jesuit Alain Woodrow affirms that decree 4 forced Jesuits in Latin America to review their relationship with the rich. They experienced a renewal in their involvement with the poor and the oppressed in Latin America and the Philippines.<sup>137</sup> Decree 12 also speaks about the renewal of evangelical poverty in the spirit of Vatican II.

### ***1.5.3.2 The Option for Justice and for the Poor in Decrees 4 and 12***

Decree 4 of the documents of the 32<sup>nd</sup> General Congregation underlines a series of new challenges to the apostolic mission of the Jesuits after Vatican II. It states:

There is a new challenge to our apostolic mission in a world increasingly interdependent but, for all that, divided by injustice: injustice not only personal but institutionalized: built into economic, social, and political structures that dominate the life of nations and the international community.<sup>138</sup>

To face the challenges in today's world, Jesuits should refer to their charism. They are invited to look back to see how Ignatius and his first companions "acted". But Jesuits should also be open to the new ideas to which Father Pedro Arrupe, Father General, called them. To former Jesuit students in 1973 he pointed out the originality of the Society of Jesus. For Father Arrupe, the originality of the Society of Jesus is not the spirit of the Council of Trent but fidelity to God's call throughout history.<sup>139</sup> At the 32<sup>nd</sup> General Congregation, the Jesuits called this fidelity to the call of God attention to the signs of the times in continuity with the spirit of Vatican II.<sup>140</sup>

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<sup>136</sup> Ibid., 411.

<sup>137</sup> Woodrow Alain, *Les Jésuites : Histoire de pouvoirs* (France : Jean-Claude Lattès, 1984), 262.

<sup>138</sup> Ibid., 412.

<sup>139</sup> Ibid., 262.

<sup>140</sup> Ibid., 486.

Concerning the option for the poor, number 20 of decree 4 highlights the following: “There are millions of men and women in our world, specific people with names and faces, who are suffering from poverty and hunger, from the unjust distribution of wealth and resources and from the consequences of racial, social, and political discrimination.”<sup>141</sup> Following this description of the social framework, the members of the Society of Jesus acknowledged that they share in the blindness and injustice of society. For this reason, every Jesuit needs to be evangelized, to encounter Christ before going to others.<sup>142</sup>

Following Saint Ignatius’s spirit, whose desire was that his companions go to those who have been abandoned, the Jesuits committed themselves “to promote justice and to enter into solidarity with the voiceless and the powerless.”<sup>143</sup> They decided that the promotion of justice should not just be one apostolic area among others, but the concern of their whole life. They took as a key of their engagement for the poor the principle of solidarity: “Solidarity with men and women who live a life of hardship and who are victims of oppression cannot be the choice of a few Jesuits only. It should be a characteristic of the life of all of us as individuals and a characteristic of our communities and institutions as well.”<sup>144</sup> The Jesuits also decided to assess their style of living. To make theirs the concern of the poor and oppressed, they decided to share more closely the kind of life of families who are of modest means. Besides, they should learn from the poor as it is written in number 50 of decree 4: “If we have the patience and the humility and the courage to walk with the poor, we will learn from what they have to teach us what we can do to help them.”<sup>145</sup>

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<sup>141</sup> Ibid., 417.

<sup>142</sup> Ibid., 418.

<sup>143</sup> Ibid., 426.

<sup>144</sup> Ibid., 428.

<sup>145</sup> Ibid.

The desire of Jesuits to bear witness to Christ in and through the poor led them to reflect on authentic poverty or voluntary poverty in continuity with the spirit of Vatican II. Number 5 of decree 12 states the following: “The Society cannot meet the demands of today’s apostolate without reform of its practice of poverty. Jesuits will be unable to hear the ‘cry of the poor’ unless they have greater personal experience of the miseries and distress of the poor.”<sup>146</sup> So, the reform implies resisting consumerism. Number 7 of decree 12 points out again the lifestyle of the Jesuits. It recommends to Jesuits a standard of living, which should not be higher than ordinary families.<sup>147</sup>

In addition, every Jesuit should depend on his community. This implies that everything that the Jesuit receives should be given to the community: stipends, alms, and gifts. The members of the community should accept the standard of living of the particular community where they live. For the credibility of the Church and of the Society of Jesus communities might be inserted among the poor. Finally, there is an interconnection between decree 4 on the promotion of justice by Jesuits in the world and decree 12 on the reform of voluntary poverty for the Jesuit. The point is that Jesuits cannot commit themselves to the poor if their own lifestyle is in contradiction with what they preach.

## **1.6 CONCLUSION**

This introductory chapter divided into four sections, aimed to clarify the notion of ‘preferential option for the poor’ and to set the scene for a comparative analysis of the language used by Pope Francis and Jon Sobrino to describe the poor / vulnerable.

Firstly, it defined some concepts such as option, preferential, poor, and vulnerable. The biblical and theological overview of the ‘preferential option for the poor’ showed that a commitment to the poor implies a real solidarity with them to change their situation.

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<sup>146</sup> Ibid., 488.

<sup>147</sup> Ibid., 489.

The preference refers to the universal love of God where nobody is excluded. Besides, an attempt to define the concepts ‘preferential’, ‘option’ and ‘poor’ disclosed the complexity of these expressions. The study of the concept ‘vulnerable’ showed that all human beings are exposed to vulnerability. It implies that diverse forms of poverty are just the manifestation of human vulnerability. From this perspective it could be said that the term vulnerable is inclusive of the concept poor. The last chapter of this thesis will deepen this understanding of the concept ‘vulnerable’ by analysing Pope Francis’ language of the vulnerable.

Secondly, the magisterium has played a key role in taking options and actions for the poor. The history and development of the option for the poor in the hundred years before Vatican II showed the continuity in the Social Teaching of the Church on the option for the poor. From Leo XIII to John XXIII and later popes, there has been a constant emphasis on the theme of justice before charity, and distributive justice. In addition, Pope John XXIII brought the theme of ‘Church of the poor’ to the forefront. The Second Vatican Council considered the call of Pope John XXIII about the Church of the poor especially in *Gaudium et Spes*. Under the papacy of John Paul II, the preferential option for the poor will receive its full seal.

Thirdly, this chapter highlighted that the meeting of Medellin (1968) committed itself to implement the Social Teaching of Vatican II. It went further and pointed out the scandalous gap between the lifestyle of bishops, priests, and religious and the common people of Latin America. It invited the leaders of the Church to follow evangelical simplicity and practice solidarity by sharing the material goods with the poor. The meeting of Puebla (1979) was in continuity with Medellin. The Puebla document dedicated a chapter especially on the preferential option for the poor. It also emerged from the Puebla meeting that the Church of Latin America was prepared to live the prophetic dimensions

of her life. The consequence was the assassination of many Christians who were committed to the cause of Justice, among them Bishop Oscar Romero in 1980 and the Jesuits of El Salvador in 1989.

Fourthly, this chapter explored the commitment of the Jesuits to the cause of Justice. This was also rooted in the example of their founder who lived evangelical poverty and left evidence in what is considered the Constitutions of the Society of Jesus. Just after Vatican II, Father Pedro Arrupe as Father General of the Society convoked the 32nd General Congregation (1974-75) of the Jesuits to revive the commitment of Jesuits around the world to the question of justice and the option for the poor. Sobrino and Pope Francis attended that meeting. Pope Francis participated in that meeting as Provincial Superior of the Jesuits in Argentina. He had experienced the recommendations of the 32nd General Congregation of the Society of Jesus. How did Saint Ignatius's spirituality and the reforms on poverty at the 32nd General Congregation influence their lives and their thoughts? We will try to give the answer to this question in the following chapters.



## CHAPTER TWO

### JON SOBRINO'S CHRISTOLOGY, LIBERATION THEOLOGY AND THE POOR

#### 2.1 INTRODUCTION

This chapter aims to explore Sobrino's Christology, his understanding of the poor, and his relation to liberation theology. It contains two sections:

The first section briefly highlights Sobrino's Christology in order to establish its relationship to Liberation theology and his understanding of the option for the poor.<sup>148</sup> It

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<sup>148</sup> Jon Sobrino was born on the 27 December 1938 in Barcelona into a Basque Family. He was educated in Spain, Germany and the USA. He entered the noviciate of the Basque province of the Society of Jesus in 1956. From 1957, he belonged to the Central American Province. He earned his master's degree in Mechanical Engineering at Saint Louis University in 1965. He defended his doctoral dissertation on theology from the Hochschule Sankt Georgen, Frankfurt in 1975. He spent the past 50 years in El Salvador. He was Professor of Philosophy and Theology at the Universidad José Simeón Cañas, El Salvador. (See Jon Sobrino, *Jesus in Latin America* (Trans. Orbis; Maryknoll, NY: Orbis, 1987); Jon Sobrino, *Jesus the Liberator: A Historical-Theological Reading of Jesus of Nazareth* (Trans. Paul Burns and Francis McDonagh; Great Britain: Burns & Oates, 1994). Jon Sobrino, *The Principle of Mercy: Taking the Crucified People from the Cross* (Trans. Orbis; Maryknoll, NY: Orbis, 1994), 1-2.) On September 2013, Jon Sobrino granted an interview to the Newsletter of the Congregation Leadership Team (CLT) of Mount St Joseph, Blarney Street, Cork, Ireland where he spoke about his life and his links to Liberation theology. According to him, he was not aware of the so-called 'Liberation Theology' until 1974, the year he came to El Salvador and was assigned to teach theology. (The article is also available at Congregation of the Leadership Team (CLT), Interview with Jon Sobrino (Trans. Joe Drexler-Dreis; Cork: Newsletter CLT 6, September 2013), 1.) He came across the writings of Gustavo Gutierrez, Leonardo Boff, Juan Luis Segundo, Porfirio Miranda and Ignacio Ellacuría. The latter was a Jesuit to whom he was very close in his theological thought. Sobrino acknowledged that he learned a lot from them and found their approach useful for his course of theology in El Salvador. He states:

"From what I learned in those years, much of it was novel, and it struck me, and I thought it was very useful for teaching theology in El Salvador. These ideas were not carrying the label "liberation." Ellacuría talked rather of "Latin American" theology. From what I was learning of the theologians who were already counted as "liberation theologians," from what I had learned in Europe, especially Rahner and Moltmann, and as I listened to Ellacuría more and more, this is what was shaping the content of my theological thinking." (Ibid.) In another article entitled 'Fifty years for a Future that is Christian and Human', Sobrino spoke about how the journal *Concilium* has had an impact on the way he lives and thinks through the writings of two prominent figures: John Baptist Metz and Ignacio Ellacuría. Metz is of highest importance for Sobrino because his theology faces the real world with honesty, his theological thinking is based on real life. Sobrino affirms: "What made such an impact on me in Metz's way of working, was that right from the start the truth of what he said did not have to be justified, not even by scripture, and not by tradition or the magisterium, but that it had its own force." (Jon Sobrino, "Fifty years for a future that is Christian and Human" in *Concilium*, February 2016/1, 69.) The second important figure who had a strong influence on Jon Sobrino is Ignacio Ellacuría. He is also a Jesuit and colleague. They were living in the same community in El Salvador. He was murdered with other fellow Jesuits in El Salvador in 1989. According to Sobrino, his thinking was based on reality and he contributed to the philosophical basis of Liberation theology. Sobrino asserts: "Shortly after Jürgen Moltmann published his book *The Crucified God*, I heard Ellacuría say that someone should publish another book, of the same size or longer, on the Crucified People. He published two articles on this topic, in 1978 'The Crucified People: an essay on historical soteriology.'" (Ibid., 71) This expression 'Crucified People' and even 'civilisation of poverty' created by Ellacuría, will be central in Sobrino's thought. This will be demonstrated in the next section. In one of his books entitled *No Salvation outside the Poor*. Sobrino testifies:

also describes his Christology constructed in response to the socio-economic reality of Latin America. Some extracts of his main writings on Liberation Theology such as *Christology at the Crossroads* and *Mysterium Liberationis* are analysed.

The second section focuses on the option for the poor in Sobrino's writings. It thoroughly analyses what is considered as a *credo* for Sobrino when talking about the Poor and salvation. What is referred to as a *credo* for Sobrino, is his formula 'there is no salvation outside the Poor'. This section also investigates the historical roots of this formula and its meaning. It raises the question of salvation for the so-called 'non-Poor' or 'the world of abundance'. Finally, this section studies the understanding of the Church of the Poor based essentially on his book *The True Church and the Poor*.

## **2.2 SOBRINO'S CHRISTOLOGY AND THE OPTION FOR THE POOR**

### **2.2.1 Brief overview of Sobrino's Christology**

In *Christology at the Crossroads: A Latin American View*, Sobrino outlines his motivations for writing this book.<sup>149</sup> Sobrino's Christology "is historically positioned and

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"What first impacted me in Ellacuria's thought was his emphasis on taking responsibility for reality; it was early in the development of liberation, and the phrase came to define theology as the ideological moment in a praxis aimed at 'the greatest possible realization of the reign of God in history'. I tried to pick up that insight by defining theology as *intellectus amoris* (*iustitiae, misericordiae*), thus going beyond Augustine's *intellectus fidei*, and beyond *intellectus spei*, as Jurgen Moltmann reformulated it in 1978, in his *Theology of Hope*." (Jon Sobrino, *No Salvation Outside the Poor: Prophetic-Utopian Essays* (Trans. Orbis; Maryknoll, NY: Orbis, 2008), 2.)

Talking about Jon Sobrino and the theology of Liberation, Aloysius Pieris states that Karl Barth is described as famous in history for using both bible and newspaper to build his theology, while Sobrino uses the cry of the Poor and the oppressed as the loci from which he explains the Scriptures and builds his theology. (Aloysius Pieris, "Jon Sobrino and Theology of Liberation" in *Asian Christian Review*, Vol 1, no 2, June 2007, 29.)

<sup>149</sup> This book was first published in Spanish in 1976 under the title *Cristología desde América Latina (esbozo a partir del seguimiento del Jesús histórico)*. Sobrino's book along the same lines as some well-known liberation theologians such as Comblin, Gutiérrez, Vidales, Assmann, and Miranda answer to the need for Liberation theology to have a Christological foundation. (See CENTRO DE REFLEXION TEOLOGICA, "Preface" in *Christology at the Crossroads: A Latin American Approach* (Trans. John Drury. Maryknoll, NY: Orbis, 1978), xi-xii. In the Preface to the English Edition, Sobrino highlights some remarks. He underlines that his book was written with the intention of giving Latin Americans a better understanding of Christ. His book also intends "to analyse how it has been possible for Christological reflection itself to obscure the figure of Jesus and to examine the dire consequences of such Christological reflection." (Jon Sobrino, "Preface to the English Edition," in *Christology at the Crossroads: A Latin American Approach* (Trans. John Drury. Maryknoll, NY: Orbis, 1978), xv. Here, Sobrino highlights three suspicions: firstly, the image of Christ has been reduced to a sublime attraction, or something positive. This

constructed from the Latin American situation of oppression, injustice, and exploitation. It is rooted in the historical Jesus and in the history of people's pain and sorrow."<sup>150</sup>

Moreover, Sobrino considers his Christology as ecclesial, historical and trinitarian.

Firstly, his Christology is ecclesial because

it reflects the life and praxis of many ecclesial communities in Latin America; as a Christology, it also hopes to foster their life and praxis and to give them meaningfulness (...) it seeks to provide the Christological underpinnings for all that Latin American theology of liberation has to say about the nature of ecclesial theory and activity.<sup>151</sup>

For Sobrino, this first stage of his Christology does not rule out the Christology based on the conciliar and papal magisterium, but it is the first stage in his hermeneutic circle.

Secondly, his Christology is historical in the sense that it reflects on Christ himself and analyses the content of Christology. For Sobrino,

if the end of Christology is to profess that Jesus is the Christ, its starting point is the affirmation that this Christ is the Jesus of history (...) It cannot mean reflecting directly on Christological dogmas; it must entail going back over the route that allowed for the formulation of those dogmas.<sup>152</sup>

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conception has led to the division between the total or whole Christ and the concrete history of Jesus and some consequences such as spiritualism and Pentecostalism. Sobrino rejects the previous alienation of the image of Christ because "Christians maintain an apparent neutrality vis-à-vis the flagrant inequities in our society. Such neutrality is wholly contrary to the partiality that Jesus displayed in favour of the oppressed." (Ibid., xvi) Secondly, Sobrino rejects the affirmation that "Christ is the embodiment of universal reconciliation." For him, this statement is true per se but "does not engage in prophetic denunciations, a Jesus who pronounces blessings but who does not pronounce maledictions, and a Jesus who loves all human beings but who is not clearly partial toward the poor and the oppressed." (Ibid.) Thirdly, Sobrino underlines another suspicion which tendency is to absolutize Christ. For him, "If Christ is in fact an absolute from every point of view, then we have the theoretical justification we need for any sort of personalist or individualist reduction of the Christian faith. By that I mean the view which sees contact with the 'Thou' of Christ as the ultimate and correct correlative for the 'I' of Individual Christian. That view also enables Christian faith to justify everything bad or wrong-headed in various strains of popular religiosity." (Ibid., xvii). Sobrino sees the consequences of maintaining the absoluteness of Christ. In the context of Latin America, this conception is bound up with a concern to maintain the absoluteness of the system of economic and political power in Latin America. For Sobrino, those who support this understanding of Christ "would prefer to maintain the seemingly orthodox affirmation of Christ's absoluteness so that the supposed absoluteness of the prevailing capitalist system might not be called into question." (Ibid., xix.)

<sup>150</sup> Ibid.

<sup>151</sup> Jon Sobrino, "Preface to the English Edition," in *Christology at the Crossroads: A Latin American Approach*, xx.

<sup>152</sup> Ibid., xxi.

From the methodological point of view, Sobrino puts the emphasis on the historical Jesus.<sup>153</sup> The focus is not on the person of Jesus but on the coming of the Kingdom of God and his work for the realisation of the Kingdom.

Thirdly, Sobrino's Christology is trinitarian. He gives credit to the Latin American theology of liberation because it is a theology that is reinstating trinitarian reflection as a serious theological theme. The question here can be: what is the difference between "Liberation theology's Trinitarian approach" and other trinitarian western approaches? He answers that the way Liberation theology theologizes itself is in fact a trinitarian process even though the term 'Trinity' does not appear in its statements. He asserts: "My point is that Liberation theology poses the hermeneutic circle in trinitarian terms (...) reflection on Jesus can only be carried out in trinitarian terms."<sup>154</sup> Sobrino's understanding of Jesus is based on a praxis that follows Him "in proclaiming the coming of the kingdom, in denouncing injustice, and in realizing that kingdom is real life" is at the heart of his Christological approach.<sup>155</sup> But how does Jesus own faith impact the life of his followers? Sobrino answers this question through his understanding of fundamental Christian morality.

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<sup>153</sup> Sobrino considers that there cannot be a Christology apart from the history of Jesus of Nazareth. He is aware of the exegetical difficulties involved in trying to go back to the historical Jesus. He states: "The historicity of Christology also appears in the use of historical categories to comprehend Jesus's history. Concretely this means that we will give preference to the praxis of Jesus over his own teaching and over the teaching that the New Testament theologians elaborated concerning his praxis. Thus, the New Testament will be viewed primarily as history and only secondly as doctrine concerning the real nature of that history. It also means that much importance will be placed on the historical categories of sin and conflict. The history of Jesus will be viewed in terms of conflict rather than in idealistic terms (...) Thus we shall be conceiving the historical Jesus as the history of Jesus, and the Son as the history of his filiation." (Ibid., xxii)

<sup>154</sup> The reflection on Jesus is 'theo-logical' in the sense that no reflection can be carried out about him except in relation to the Father and his Kingdom. Moreover, the reflection is 'Christo-logical' "because it affirms that in Jesus, we have the revelation of the Son of God and all that means. The revelation of the Son in the history of Jesus shows us completely and definitively how human beings can correspond to the ultimate mystery of God in the midst of historical existence." (Ibid., xxiii.) The reflection on Jesus is 'pneumatological' "insofar as it affirms that human beings can see him as the Son and draw closer to the Father only if they live a life in accordance with the Spirit of Jesus. We can come to know Jesus as the Christ only insofar as we start a new life, break with the past and undergo conversion, engage in Christian practice and fight for the justice of God's kingdom." (Ibid., xxiv.)

<sup>155</sup> Ibid.

## 2.2. 2 Fundamental Christian Moral Theology and the Poor

Sobrino questioned the impact of Jesus' own faith for the moral life of being Christian.<sup>156</sup> He formulated a 'fundamental Christian Morality' taking as his criterion the Jesus of history.<sup>157</sup> For him, it means exploring "the original nucleus of the Christian moral experience insofar as it is grounded in Jesus (...) that nucleus takes place within the hermeneutic circle, which runs between 'Jesus' and 'the understanding of Jesus in subsequent history'."<sup>158</sup> He understands the adjective 'Christian' as 'going back to Jesus'. Moreover, his Fundamental Moral Theology does not intend to express what the Christian is supposed to do. Above all his intention is to focus on Jesus whose action is concrete and historical. Besides, Sobrino does not reflect on Christian morality in terms of subject but in terms of objects. In other words, Sobrino is interested in the consequences of the imitation of Jesus' life in the daily life of the Christians. He asserts: "Hence it is not a matter of studying the moral subject as someone who by very nature is under an obligation to do a certain thing. Rather, we want to see the meaning of this obligation in terms of Jesus."<sup>159</sup>

Interpreting his fundamental Christian morality in the framework of his Christology, Sobrino notes that the obligatory aspect of morality is not something that Jesus imposes on people, but it derives from the Christian's belief. In fact, Christians are witnesses, and they are invited to give an account of their faith in Jesus in both their proclamation and their concrete lifestyle. In this perspective, Christian morality will result

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<sup>156</sup> Sobrino, *Christology at the Crossroads*, 108.

<sup>157</sup> Sobrino is aware of the complexity of his reflection. Talking about Christian Morality, he states: "In negative terms this means that we are not going to consider moral theology directly as a theology based on some natural ethics—more specifically, on one or another of the ethics that have appeared as philosophical ethics in the course of history and that have been referred to Jesus for confirmation, completion, alteration, or rejection. We are not going to baptize any natural ethics. Instead we are going to try to find the ethical strand in the fundamental Christian experience." (Ibid., 109)

<sup>158</sup> For Sobrino, the adjective 'fundamental' means what "founds Christian morality and gives it a Christian sense." (Ibid., 110).

<sup>159</sup> Ibid., 111.

from “an inner experience in which they came to realize that the ultimate meaning of history and their own person would come from being like Jesus.”<sup>160</sup> The consequence of this way of understanding morality is that every basic experience will have two characteristics: urgency and gratuitousness. The urgency to be like Jesus, and the assurances to be conscious that it is something given to Christians, is a gift rooted in the theological nature of his resurrection.<sup>161</sup>

Sobrino asserts:

In the resurrection-experience, which is typified by the apparitions, Jesus does not turn against those who failed to recognize him and put him to death; instead he offers them pardon and invites them to follow his own path. Hence the urgency to be like Jesus is grasped in the experience of one’s own sinfulness. One now realizes that one’s own sinfulness is no perduring obstacle to finding meaning in life and fleshing it out in reality (...) It is basically the experience that Paul succinctly states: “The love of Christ impels us” (2 Cor. 5:14).<sup>162</sup>

For Sobrino, if the obligation of Christian morality is to be found in the impact that the history of Jesus has on Christians, then the object of moral theology should be the mission of historically reproducing Jesus’s own history. Moral theology should not seek to determine what is good and what is evil or to establish some hierarchy of moral values (even though those questions should also be given some consideration.) Above all, fundamental moral theology should seek the answer to the question: “What does it mean to reproduce the life of Jesus and how is that task carried out?”<sup>163</sup> It means that

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<sup>160</sup> Ibid.

<sup>161</sup> Sobrino quotes two passages from the Prologue to Saint John’s Gospel to justify the urgency and the gratuitousness of every basic experience of Christian morality: “for the Law was given through Moses, grace and truth have come through Jesus Christ.” (John 1: 17) and “who were born not from human stock or human desire or human will but from God himself” (John 1:13.) (See *The New Jerusalem Bible*). Sobrino refers to these passages to explain that the urgency to be like Jesus was framed and experienced in terms of an urgency to be grateful. He states: “This was true in at least two senses. First, Christians could sense the gratuitous nature of the Jesus-event itself (John 1:17), which did not stand in any direct continuity with history (John 1:13). It was not a straightforward human possibility, but something given to us as a gift. Thus, the urgency of this morality took on the nature of a grateful response to a proffered possibility that had not been contemplated previously.” (Ibid., 111)

<sup>162</sup> Ibid., 112. Sobrino explains Christian morality in terms of the resurrection-experience by the fact that “Jesus’s life prior to his death was not yet complete; it was not yet the whole history of Jesus.” (Ibid.)

<sup>163</sup> Ibid., 113.

the object of moral theology is concretised through the ethical experience of Jesus himself, which was the proclamation of the 'Kingdom of God' and the effort to make it real and present (...) moral theology must focus directly on the question: what must be done in order to establish the kingdom of God in history? The direct focus, then, is on the kind of action that correctly fashions the kingdom. And while that will really involve consideration of moral subjects and their goodness, it will do so only indirectly (...) In this sense Jesus becomes normative for personal morality as well, not by proclaiming the validity of certain universal values but rather by historicizing them. And that historicization is nothing else but the fashioning of the kingdom.<sup>164</sup>

Finally, discipleship means to reproduce Jesus's own way of life in oneself, and one's life. That is the fundamental moral exigency according to Sobrino.<sup>165</sup> The moral exigency is also expressed in terms of the Kingdom of God, which does not mean only following Jesus but also imitating Him in terms of results or the consequences of reproducing Jesus' life in our history.<sup>166</sup> Sobrino calls it liberation.<sup>167</sup> For Sobrino, the phrase 'kingdom of God' is a utopian symbol, which means

a new, a wholly new and definitive way of living and being. It presupposes renewal in many areas: in the heart of the human person, in societal relationships, and in the cosmos at large (...) the final goal is one of universal

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<sup>164</sup> Ibid., 113-14. Personal morality should not be assessed in "terms of the subject 'being good' but rather in terms of the subject becoming good through bringing about the kingdom. The fundamental ethical question is viewed formally as the whole issue of making history good, which includes the question of how the moral subject becomes good." (Ibid., 114-15)

<sup>165</sup> Sobrino solves a difficulty that might arise from Jesus's own life in the following terms: "The Synoptic Gospels often report that Jesus approached certain types of people—including the poor, the sick, and the public sinners—and imposed on them the fundamental demand that they have faith in the approaching God (...) What he demands of them, then, is faith and hope in God along with certain moral exigencies, summed up in his phrase: 'Go and sin no more.' "(Ibid.) For him, Jesus did not ask them to follow him in any strict sense but to adopt a new way of life based on his own.

<sup>166</sup> Sobrino invites the reader to understand the imitation of Jesus by his disciples in the framework of his hermeneutic circle. For him, it is impossible for Christians to imitate exactly what Jesus did. In this sense, there is no moral life without historical localization because Jesus's morality is historically situated (Ibid., 132.) There is another limit to the understanding of the moral values in terms of historicising Jesus's own life because there is also an eschatological dimension to the Kingdom of God. Here, Sobrino evokes the experience of gratuitousness which does not mean only to recite prayers but also to never give up the thirst for justice.

<sup>167</sup> But there is a complexity between Jesus's demand to those he encounters to have faith and his comprehensive demand of discipleship. Sobrino expresses it in the following terms: "The faith achieved by those ostracized from society is already a kind of liberation, at least in germ. (...) Through this faith and hope in the approaching God, the ostracized persons recovered the dignity that society had stripped away from them. Thus, the kingdom of God was realized in at least a germinal way, though this does not mean that Jesus might not pose some further demand to the person involved. The silence of the Synoptics with regard to Jesus' imposing the demand of discipleship on those people does not affect our position here. It does not mean that we are wrong in saying that discipleship is the most comprehensive demand made by Jesus, for Jesus' relationship to those people is examined from a different standpoint. In their case the Gospels focus on the moment when liberation becomes possible for them and describe what Jesus demands of them at that point." (Ibid., 116)

reconciliation (...) To effect reconciliation is to do justice, and we can say that the basic general value of Jesus is that of doing Justice.<sup>168</sup>

Sobrino remarks that the term justice should not be understood as distributive justice but justice in the sense described by the Old Testament, which means the liberation of Israel. God's justice is essentially a salvific activity for the restoration of the good things promised by Him.<sup>169</sup> For Sobrino, the basic moral question should be: "What do we have to do in order to bring about the kingdom of God in history?"<sup>170</sup> The Gospel narratives show how Jesus surrounds himself with the marginalised, such as: sinners, publicans, the sick, lepers, Samaritans, pagans, and women. This encounter of Jesus with the outcast of his day is the basic characteristic of his praxis.<sup>171</sup> In this perspective, basic ethics from Jesus are bringing about the kingdom of God, which means to transform the life of the outcast.<sup>172</sup> If Jesus proclaimed the kingdom as good news to the poor (Lk 4:18; 7:22; Matt. 11:5), it means that the concept should not be only a universal symbol of utopian hope, but the good news should be called liberation. Moreover, Jesus' relation to the outcast does not only show how the kingdom should be in action but it also describes Jesus' voluntary solidarity with the poor and the outcast. Sobrino states:

The actual relations between Jesus and the poor and the outcast show both that the *bonum* of fundamental Christian morality, lies in bringing the kingdom of God into being for the poor, and that the basic way in which this is to be brought about is voluntary impoverishment in solidarity with the poor.<sup>173</sup>

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<sup>168</sup> Ibid., 119.

<sup>169</sup> Ibid. To the question whether this justice is directed to the individual or society, Sobrino answers that in Jesus we find a dialectical conception embracing both sides, particularly if we consider what Jesus himself does as well as what he says.

<sup>170</sup> Jon Sobrino, *Jesus in Latin America* (Trans. Orbis: Maryknoll, NY: Orbis, 1987), 141.

<sup>171</sup> Referring to the narrative gospels Sobrino remarks: "This study does not purport to be an exegesis of the various synoptic traditions and their contributions to the subject. I am not trying to discover what in their accounts of Jesus is genuinely historical as opposed to historicized in the early communities, but I am assuming that there exists a sufficient deposit of historicity related to the subject to enable the data to be ordered systematically." (Ibid., 185) These remarks also highlight the fact that this research does not intend to go in the direction of the exegetical study of the passage but will refer to the passage just to explain Sobrino's understanding of fundamental moral theology and the poor.

<sup>172</sup> Sobrino underlines the complexity of the phrase 'kingdom of God'. Jesus announces that the kingdom is coming, and it is 'good news' (Mark 1:15; Matt. 4:23; Luke 4:43.)

<sup>173</sup> Ibid., 146.



To sum up, the re-creative justice is the basic moral value proclaimed and exemplified by Jesus. In this perspective,

the fundamental moral value for the follower of Jesus is bringing about the kingdom of God, which means doing the work of re-creative justice and achieving brotherhood. It is also expressed by a voluntary impoverishment in solidarity. It implies also emphasising “the scandalous element in God’s own reality, kenosis, the impoverishment and humiliation of the Son.”<sup>174</sup>

The effort of Christian Moral Theology should always be to ‘Christianise’ the understanding of God. It is through this effort that the follower of Jesus simultaneously becomes a just person and a child of God.<sup>175</sup> Sobrino asserts:

Christian morality is bringing about the kingdom, fighting for a justice that will re-create humankind and its situation from the view point of the poor. Openness to love as effective action and love as suffering is also a historical constant in any morality based on Jesus. So is the principle of letting oneself and one’s viewpoint be shaped by the poor. It is not simply a translation of the abstract moral principle that one must do good; It is a Christian concretion of that basic principle. Yet there is some truth in the view noted above. It is true in the sense that Christian morality does not make Jesus into a ‘law’; rather, he serves as its ‘spirit.’<sup>176</sup>

To sum up, the instauration of the Kingdom of God is the ethical aspect of the Christian’s life. In addition, the Christians are not invited to fulfil any moral obligations, but the fact that they live their faith like Jesus should lead them to the commitment for

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<sup>174</sup> Ibid.

<sup>175</sup> Ibid., 123. Inspired by the traditional view in fundamental moral theology which states that “the first obligation of conscience is the obligation to form one’s conscience”, Sobrino’s concerns can be summarised in the question: how do we form our conscience in historical terms? Based on Jesus’ own history, he suggests three principles governing the implementation of moral values. The first principle is the situation itself. Referring to Jesus, Sobrino explains that Jesus’s society was divided into classes who conflicted with one another. In that context, Jesus viewed the necessity for justice and he considered the situation as totality and that is what is expressed in terms of the ‘Kingdom of God’. The second principle that governs the concretion of moral values is the element of conflict. Sobrino explains it by the fact that there is not only contradiction between the ideal of justice and the reality of injustice but also by the fact that “the realization of justice must necessarily entail a fight against injustice, for injustice will not disappear simply because one has a positive intention to establish justice as Jesus did. The third and last principle that governs moral values is the ‘conversion’ of the subject. It implies two things: firstly, to choose love as the supreme value in life. Secondly, to understand that the basic ideal of love passes through historical stages. The historical stages cannot be planned but they are discovered in the historical process itself. They are expressed in terms of the ‘radicalness of the demand for discipleship’, the invitation to be perfect as our heavenly Father is perfect, and the need of discernment (Ibid., 127-129). In addition, Christian discernment is not only the avoidance of evil, but the choice between various possible goods (Ibid., 130)

<sup>176</sup> Ibid., 137.

justice in the society. Sobrino calls it ‘re-creative justice’, which is the purpose of the instauration of the Kingdom of God. He also calls it liberation. Finally, Sobrino’s Christology and Sobrino’s understanding of Christian morality should always be situated in the context of Liberation theology. For this reason, the next section of this chapter looks at Sobrino’s relationship to Liberation Theology.

### **2.3 JON SOBRINO AND LIBERATION THEOLOGY**

Speaking about Jon Sobrino’s relationship to Liberation theology leads us to the purpose of his book entitled *Christology at the Crossroads: A Latin America view*, which he published four years after Boff’s important book entitled *Jesus Christ Liberator: A critical Christology of our time*. It is a systematic Christology constructed from the situation of oppression and injustice in Latin America.<sup>177</sup> His book contributes to and complements the area of theological methodology adopted by Latin American theology, especially Liberation theology. Sobrino’s starting point is the historical Jesus, which should be understood as the person of Jesus, his teaching, his attitudes and his deeds, which are accessible to historical and exegetical investigation.<sup>178</sup> Sobrino declares:

In Latin America Liberation theology has focused spontaneously on the historical Jesus for guidance and orientation. Since it arose out of the concrete experience and praxis of faith within a lived commitment to liberation, it soon realized that the universality of Christ amid those circumstances could only be grasped from the standpoint of the concrete Christ of history.<sup>179</sup>

From this perspective, Latin American theology considers the life of a Christian as a whole rather than individual Christian life and insists on the horizon of liberation. The implication is that theologizing becomes a real service.<sup>180</sup> Finally, Liberation theology focuses on Christology insofar as Jesus himself is the way to liberation.

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<sup>177</sup> Jon Sobrino, *Christology at the Crossroads: A Latin American Approach* (Trans. John Drury; Maryknoll, NY: Orbis, 1976), xii.

<sup>178</sup> *Ibid.*, 3.

<sup>179</sup> *Ibid.*, 10.

<sup>180</sup> *Ibid.*, 34.

A few years after the publication of *Christology at the Crossroads*, Sobrino edited another book entitled *Mysterium Liberationis* on the fundamental concepts of Liberation theology where he gives more information about his understanding of Liberation theology. The book brings together the founding fathers of Liberation theology and the major liberation theologians of Latin America such as Gustavo Gutierrez, Clodovis Boff, Leonardo Boff, etc. Sobrino wrote three articles, one of those articles entitled *Central Position of the Reign of God in Liberation Theology* sketches clearly Sobrino's relationship to Liberation theology.

Sobrino conceives Liberation theology as a theology of the Reign of God. For him, defining Liberation theology in this way does not mean that Liberation theology turns back on other themes in theology such as resurrection or eschaton. In so far as Liberation theology "assigns primacy to the liberation of the Poor, it sees the eschaton better expressed in terms of the Reign of God".<sup>181</sup> What are the reasons for Liberation theology giving primacy to the Reign of God?

First of all, it is because Liberation theology is a historical theology. In other words, it searches "to verify in history, the entire content of faith, including strictly transcendent content".<sup>182</sup> Liberation theology is the theology of salvation as liberation. This way of doing theology includes prophetic, praxis and popular theology.

Prophetic theology considers that sin and historical sin should be exposed and denounced. Praxis theology focuses on the transformation of reality. It defends itself by affirming that it can help in the transformation of history. On Popular theology, Sobrino acknowledges that it is complex. However, he suggests that this kind of theology "sees in the people, in the twin connotation of 'people' as poverty and as collectivity, the

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<sup>181</sup> Jon Sobrino, "Central Position of the Reign of God in Liberation Theology" in *Mysterium Liberationis: Fundamental Concepts of Liberation Theology* (Trans. Robert R. Barr; Maryknoll, NY: Orbis, 1993), 352.

<sup>182</sup> Ibid.

addressee, and in some theologians, however analogically, the very subject of theology.”<sup>183</sup> For Sobrino, Liberation theology does not disregard the resurrection as a central theme of reflection but situates it within the ‘Reign of God’, which is more comprehensive.

Secondly, from Sobrino’s point of view, the theme of the Reign of God provides the tools to organise not only Liberation theology but the whole of theology, as theology ought to be practiced in the reality of the Third World. The Reign of God as a theme of theology exposes the historical wickedness of the world in personal and collective sins. It describes its expansion as a negation of the Reign of God.<sup>184</sup> Sobrino concludes that the destruction and the impoverishment of human life is not only a moral problem, but also a theological problem, because it is the problem of sin in action. Viewing liberation in terms of the Reign of God does justice to Liberation theology’s original intuition that liberation in its plenitude is ‘integral liberation.’<sup>185</sup>

Thirdly, the primacy of the Reign of God in Liberation theology comes from the fact that Liberation theology is based explicitly on the reality of Latin America and of the Third World. Antecedent to any theological reflection is reality itself, which asks to be seen as the reality of life or death, that calls for an option for life or death.<sup>186</sup> Therefore, “what has occurred in Liberation theology is that, in a pre-theological moment, reality has been grasped as an irruption of the Poor with a hope of liberation.” This has been a reality for the Poor in Latin America and the Third World. For Sobrino, the Third World still needs liberation and the best theological way to deal with it is by expressing it in terms of the Reign of God.<sup>187</sup>

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<sup>183</sup> Ibid., 353.

<sup>184</sup> Ibid., 355.

<sup>185</sup> Ibid., 356.

<sup>186</sup> Ibid.

<sup>187</sup> Ibid., 357.

In another article entitled *La Teología y el 'Principio Liberación'*, Sobrino speaks about Liberation theology as a theology constructed from the reality of the victims and it should be considered a sign of the times. He says that the victims should be understood as the Poor.<sup>188</sup> For him, doing theology is to conceptualise reality. Therefore, from reality, theology should draw the concepts and consequences.

This implies that Liberation theology and all theology must participate in the primary reaction, which is compassion in a suffering world. Therefore, theology becomes *intellectus amoris* in order to respond to suffering. For Sobrino, compassion becomes liberation and Liberation theology participates in it.<sup>189</sup> Liberation theology understands itself as *intellectus amoris* because it takes into account, in a particular way, love, justice and mercy as *loci* where it engages the intellect and enables it to realize its own nature. However, Liberation theology also considers itself as holistic theology, which embraces the whole of revelation.<sup>190</sup> Jon Sobrino concludes that:

Liberation theology is one theology; it is the historical form that responsible Christian reflection has taken when confronted by a suffering world. Although this theology may take different shape in the future, its central affirmation remains permanently valid: The most truth-filled place for any Christian theology to carry out its task is always the suffering of our world and in the crucified people of our world.

Finally, for Sobrino, this reality and especially the reality of the Poor, or the victims or the crucified people, is essential not only to Liberation theology but to theology in general. How do the Poor appear in his theological reflection? The second section of this chapter answers this question.

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<sup>188</sup> Jon Sobrino, "La Teología y el 'Principio Liberación'" in *Revista Latinoamericana de Teología*, 35 (1995), 119.

<sup>189</sup> Jon Sobrino, *The Principle of Mercy* (Trans. Orbis; Maryknoll, NY: Orbis, 1994), 36-37.

<sup>190</sup> *Ibid.*, 42-43.

## 2.4 THE OPTION FOR THE POOR IN JON SOBRINO'S THOUGHT

### 2.4.1. Sobrino's understanding of the Poor

A better understanding of the option for the Poor in Jon Sobrino's thought cannot be reached without recalling his Christological project. Sobrino built a Christology inspired and influenced by the South American context, especially in the context of El Salvador. Its Christological foundation is based on the growing awareness of the Poor in theological thought. Sobrino also talks about the emergence of a specific image of Jesus. This image of Jesus cannot be understood without referring to the centrality of the Poor in the recent history of Latin America.<sup>191</sup> In an introduction to the French edition of his book *Jesus the Liberator*, Sobrino highlights how the reality of the Poor has come to the spotlight since Vatican II not only as a sign of the times but also as reality that cannot be dissimulated or hidden. In other words, this reality of the Poor is revealed in the injustice and repression in the 1970<sup>s</sup>, and 1980<sup>s</sup>, in Latin America as mentioned in the previous section. This reality is perceived as follows :

Ce qui faisait irruption, c'étaient l'injustice et la mort qui ont sévi pendant des siècles, et qui n'avaient pas été prises au sérieux par la théologie. A El Salvador, la faim, l'injustice, la répression des années 1970 et la guerre des années 1980. Au Guatemala, en outre des massacres d'indigènes perpétrés pendant cinquante ans. Mais, cette fois-ci, tout fut pris en compte par la théologie, et avec sérieux, en tant qu'évènements réels par la théologie.<sup>192</sup>

Therefore, the Latin American context marked by oppression gave rise to an image of Christ presented as liberator. Christ was perceived as the Liberator from different forms of oppression.<sup>193</sup> Moreover, Christ was viewed in relation to the basic needs of the Poor. Christ was presented as the one who gave his life in opposition to the anti-life. According to Sobrino, doing theology and Christology from the reality of the Poor led theologians

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<sup>191</sup> Jon Sobrino, *Jésus-Christ Libérateur : Lecture historico-théologique de Jésus de Nazareth* (Trans. Thérèse Benito; Paris: Cerf, 2014), 14.

<sup>192</sup> *Ibid.*, 16.

<sup>193</sup> *Ibid.*, 49.

to find the essence of Jesus who is the Good News of the kingdom of life for the Poor.<sup>194</sup>

In this perspective, the option for the poor went beyond the pastoral option and became a holistic option that helps us to see the totality from an angle of the Poor.

Talking about the option for the poor, Sobrino begins by asking two questions: what must the Church do for the Poor? What can the Poor do for the Church or for the society? For him, these two questions help the readers to understand the option for the poor as a way to move towards a truly human and inclusive globalization.<sup>195</sup> Sobrino views the option for the Poor in the framework of the mission of the Church. His starting point is that the mystery of the Poor is prior to the ecclesial mission. Even though God and Christ are prior to the option for the Poor, the mystery of God and Christ is being revealed in relationship to the Poor of this world.<sup>196</sup> To understand deeply the mission of the Church in relationship to the Poor, Sobrino presents his understanding of the Poor. For him, there is a diversity and depth of the Poor:

In the Palestine of Jesus' time, for example, the Poor could be described as follows: the socially excluded (lepers and mentally handicapped), the religiously marginalized (prostitutes and tax collectors), the culturally oppressed (women and children), the socially dependant (widows and orphans), the physically handicapped (deaf and mute, crippled and blind), the psychologically tormented (spirit-possessed and epileptic), and the spiritually humble (simple, God-fearing people, repentant sinners).<sup>197</sup>

This quotation refers to several New Testament passages about the mission of Jesus and the Poor. Sobrino cites Lk 4:18; 7:22 and Mt 11:5. In the first passage, Jesus is sent first to the Poor. It is to them that the Kingdom of God is announced first. For Sobrino, the relationship between the Kingdom of God and the Poor is established in the Gospels. Therefore, the Poor are the preferred ones in this relationship. In other words, the Poor are the first recipients of the Kingdom.<sup>198</sup> Sobrino mentions other passages from the

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<sup>194</sup> Ibid., 83.

<sup>195</sup> Ibid., 19.

<sup>196</sup> Ibid., 21.

<sup>197</sup> Ibid., 22.

<sup>198</sup> Ibid., 161.

synoptics to describe the Poor as found in the previous quotation. For example, in Lk 6:20-21, the Poor are those who are hungry, thirsty, the prisoners and those who weep. The Poor are also the despised and marginalized of the society (Mk 2:16; Mt 11:19; 21:32; Lk 15:1)

Moving from the understanding of the Poor in the Scripture, Sobrino considers that today the concept of the Poor needs to be reformulated because life itself is a burden for the majority of human beings. He recognised the depth of poverty in the burden carried by the majority of human beings who suffer from material destitution. This burden affects not only the Poor but also those who cause poverty. Sobrino notes that this depth of poverty is the most important discovery of Medellin and Liberation theology because they emphasized that God is the God of liberation and God is known through the Poor. Mention of this has been made at the meetings of Puebla and San Domingo. Sobrino underlines the fact that hunger and hunger-related illnesses kill more than 50 million every year. In addition, he notes the anthropological poverty highlighted twenty years ago by the Cameroonian Jesuit historian Engelbert Mveng.<sup>199</sup> Sobrino reports that when he was

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<sup>199</sup> Engelbert Mveng is considered as one of the pioneers of Liberation theology in Africa. With the theme 'anthropological poverty', the Jesuit theologian has made a significant contribution to the understanding of the concept of poverty. Many studies had reduced poverty in the African context to material poverty. Through the anthropological concept of poverty, Mveng has shown that the problem of the African people is not first bound to material poverty but to anthropological poverty because of slavery and colonization. The slave trade and colonization have emptied the Africans of their cultural being. (Francois-Xavier Akono, *Explorer la théologie d'Engelbert Mveng : Inculturer la foi chrétienne et libérer la personne humaine en contexte africain* (Paris : Edilivres, 2011), 16.) In an interview, the Cameroonian Jesuit asserts that the African Continent has been emptied of its material and spiritual possessions and even its identity. He states : "Le continent africain a été dépouillé de toutes ses richesses non seulement matérielles mais encore spirituelles, notamment de son identité, de sa culture, de son histoire et des multiples expressions de la foi. C'est ce que nous avons tantôt appelé la paupérisation anthropologique." (Engelbert Mveng-B.L. Lipawing, *Théologie, Libération et cultures africaines : Dialogue sur l'anthropologie négro-africaine*, (Yaoundé : Clé, 1996), 40.)

Although the theme of anthropological poverty is central in the theology of Mveng, it is only one side of what the Jesuit described when speaking of the apparatus of impoverishment. In an article devoted to the situation of poverty in Africa and development, Engelbert Mveng describes the situation of African states that got independence in a state of complete self-emptying. For the Cameroonian Jesuit, the African states got their independence without real sovereignty. This is justified by the fact that the African people in their accession to independence were not prepared for the model of the state that they intended to build. Moreover, their leaders fought more for power than liberation of their people. It is in this perspective that the African states from their origin have become instruments of domination in the hands of Africans over their own people. The deprivation of sovereignty is manifested by the fact that African states, at their



working in Latin America he came across other categories of poverty such as the cries of women, indigenous people, and Afro-Americans.<sup>200</sup>

Sobrino summarizes the diverse dimensions of the reality of the Poor in five categories: the materially Poor, the dialectically Poor, the consciously Poor, the liberatively Poor and the spiritually Poor.<sup>201</sup> The first category is the most emphasized by Sobrino. It relates to the economic understanding of the Poor. Sobrino considers this category of the Poor as those who cannot take life for granted. They are exposed to death because of their condition. The second category is the dialectically poor. They are those who have been impoverished and oppressed. They are excluded from the opportunity to work. They are those who are sociologically marginalized, “they have no name, either in life or in death”.<sup>202</sup>

The third category is the consciously Poor. Sobrino defines them as “those who have achieved an awareness, individual and collective, about the very reality of material poverty and its causes. They have stopped believing that their poverty is natural and inevitable”.<sup>203</sup> The fourth group is the liberatively Poor. It is those who pick themselves up and transform the awareness mentioned in the previous category into action and organization of liberating solidarity. They are aware of the situation of poverty and they commit themselves to free others. The last category is the spiritually Poor. They are those who experience their dependence on God with hope, with mercy, and with fortitude in persecution in order to fight for the liberation of the majority of the Poor. They do so by

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accession to independence, had no money or trained army. The consequence was that such states become dependent on foreign powers since they had no monetary system. To frame and strengthen these channels, foreign powers invent mechanisms under the mask of philanthropy, a mask that hides corruption. So, there is a form of structural and corruptive impoverishment that links to anthropological poverty. (Engelbert Mveng, “Paupérisation et développement en Afrique,” <http://www.peupleawa.com> (accessed 25/08/2016).)

<sup>200</sup> Ibid., 24-25.

<sup>201</sup> Sobrino, *No Salvation Outside the Poor: Prophetic-Utopian Essays*, 58.

<sup>202</sup> Ibid., 59.

<sup>203</sup> Ibid.

offering their own lives.<sup>204</sup> From the Christian point of view, this last category of the Poor has a double dimension: theological and Christological. Theological because the Poor in spirit are God's predilection and Christological because Christ is present in them.<sup>205</sup>

To describe the situation of poverty in Latin America and the world, Sobrino uses the term 'Lazaruses'.<sup>206</sup> For him more than 1.3 billion human beings live on less than a dollar a day. In theological language, he calls it the 'macroblasphemy', in other words the 'biggest contempt for the Poor'. For him, it is a contradiction in a world where those 'Lazaruses' coexist with 'rich men'.<sup>207</sup> He highlights the soccer industry as one of the scandalous and rich milieu of our world. It seems that sports and entertainment industries are immune to any critique of the capitalism that infects them. When Sobrino wrote this article, he realised at that time the three best-paid soccer players in the world all played in the same Spanish team. They were an Englishman, a Frenchman and the Brazilian who earned 42 million US dollars a year.<sup>208</sup>

By comparison, he came to the following conclusion: "the San Salvador metropolitan area, with 1,821,532 inhabitants, has an annual budget of 45.6 million US dollars a year. This is comparative harm, a shameless insult to the Poor, a failure of the human family. In theological language it is the failure of God in creation".<sup>209</sup> For these reasons and those mentioned at the outset of this section, Sobrino concludes that there is a need to reverse the course of history. That is why he supports the idea that 'there is no salvation outside the Poor'. The following section will elucidate what Sobrino means by this.

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<sup>204</sup> Ibid.

<sup>205</sup> Ibid.

<sup>206</sup> Ibid., 25. This word describes various faces of poverty such as material poverty, oppression, marginalization from the society, etc.

<sup>207</sup> See Luc 16:19-31.

<sup>208</sup> Ibid., 26. The reader might wonder whether that money was earned by one player or all the three players. Sobrino is not precise about this.

<sup>209</sup> Ibid.

#### 2.4.2. The formula “No Salvation outside the Poor”

First of all, the historical analysis of the above formula will be explored. Then this study will highlight the relationship between salvation and the Poor in Sobrino’s thought.

For Sobrino, the formula: "there is no salvation outside the Poor” comes from the Latin phrase ‘*Extra Pauperes Nulla Salus*’. This has many phases in the church’s tradition and theological history. To understand the formula, he goes back to the formulation of Saint Cyprian, ‘*Extra Ecclesiam Nulla Salus*’. Then Sobrino refers to another formulation from the theologian Edward Schillebeeckx after Vatican II. Speaking about salvation, Schillebeeckx believes it cannot happen outside the world. Therefore, we have the formula ‘*Extra Mundum Nulla Salus*’. Sobrino recalls that the Medellin conference was not only a result of Vatican II, but also the meeting’s emphasis was placed on the fact that faith and the Church are connected to the world. The fourth step to explain Sobrino’s formula refers to Archbishop Romero who, to explain how the mystery of God is revealed in the Poor, endorsed the formula of Saint Irenaeus, which asserts that the glory of God is the person fully alive. Romero reformulated his formula as ‘*gloria Dei vivens pauper*’ which means the glory of God is alive in the Poor.<sup>210</sup> This study will analyse step by step the historical background in order to understand the formula “*Extra Pauperes Nulla Salus*’.

Firstly, the formula ‘*Extra Ecclesiam Nulla Salus*’ goes back to the context of division in the Church in Northern Africa during the 3<sup>rd</sup> century. When Saint Cyprian was bishop of Cartage (today Tunisia), there was a persecution by the Roman Emperor Decius, which created not only martyrs but also apostates. The apostates were those who denied their Christian faith to escape the persecution.<sup>211</sup> After the persecution, came the question

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<sup>210</sup> Ibid., 70.

<sup>211</sup> Cyprien de Carthage, *Ceux qui sont Tombés* (Coll. Sources Chrétiennes 547 ; Trans. Michel Poirier ; Paris : Cerf, 2012), 52.

of the readmission of those who had renounced their faith in the Christian community. Some confessors were reconciling the lapsed in easy terms without the permission of the bishop, based on the merits of the martyrs. It is in this context that Saint Cyprian's formula could be understood. To deal with the situation of crisis in relation to the lapsed, Cyprian led the African bishops by suggesting three theological positions:

that Peter and the apostles, as the original college of bishops, had received from Christ the power to forgive major sins committed after baptism; that the unity of the church derives from God, so that the sin of attempting to divide it was equivalent to apostasy; and that only bishops legitimately established within the unity of the church could sanctify through baptism and the Eucharist. Thus no one could be saved outside the unity of the bishops' church (which they viewed as the one Catholic Church)<sup>212</sup>.

To explain his formula, Sobrino also refers to the Dominican theologian Edward Schillebeeckx with the statement "*extra mundum nulla salus*". Gibellini describing the history of the theological reflection of Schillebeeckx, evoked a considerable change in his thought after the Second Vatican Council. In fact, Schillebeeckx was trained in the Thomist school. Paradoxically, after Vatican II he abandoned the Thomist school in which he was trained at Louvain to confront the new hermeneutics and the dialogue with human experience in the contemporary world after Vatican II.<sup>213</sup> It is in this context that the formula *extra mundum nulla salus* should be situated. The statement is found in his book entitled *Church: The Human Story of God*. He states: "The world and human history in which God wills to bring about salvation are the basis of the whole reality of faith; it is there that salvation is achieved in the first instance."<sup>214</sup> For Schillebeeckx, human history has a theological dimension such as human life with its questions and dilemmas. So, theology should not be done divorced from reality.<sup>215</sup>

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<sup>212</sup> J. Patout Burns, "Cyprian of Carthage" in *The Cambridge Dictionary of Christianity* (Cambridge: University press, 2010), 296.

<sup>213</sup> Rosino Gibellini, *Panorama de la théologie au XXe Siècle* (Trans. Cerf; Paris: Cerf, 1994), 373.

<sup>214</sup> Edward Schillebeeckx, *Church: The Human story of God* (Trans. John Bowden; London: SCM, 1990), 12.

<sup>215</sup> Erik Borgman, *Edward Schillebeeckx: A Theologian in his History. A Catholic Theology of Culture (1914-1965)* (Trans. John Bowden; London: Continuum, 2003), 374.

In explaining his formula, Sobrino mentions the meeting of Medellin in Colombia in 1968. For him, the meeting of Medellin affected the understanding of Salvation because it related faith and church not to the world, but to the Poor.<sup>216</sup> He states: “Medellin granted the Poor a status of hermeneutical privilege; that is, Medellin prioritized the ability to understand realities and texts from their perspective. Medellin insisted that all the contents of theology should be seen in relation to the Poor.”<sup>217</sup> We have widely analysed this meeting in our first chapter. It is important to remark here that this meeting helped Sobrino to build the formula ‘*Extra pauperes nulla salus*’.

Sobrino also mentions Archbishop Romero<sup>218</sup> to explain his revolutionary formula. According to him, Romero’s theology has been built ‘from among the Poor’.<sup>219</sup> In his short three years as archbishop of San Salvador, Romero got close to poor people in their impoverished rural communities. As auxiliary bishop of Santiago de Maria, Romero’s care for the Poor had been consistent. He denounced the injustice suffered by coffee workers in his diocese. He gave voice to the voiceless Poor by taking their side and by speaking against the oppressors and asking for their conversion.<sup>220</sup>

Romero “proclaimed the word in such a way that it became flesh in the conflictual history of El Salvador and gave hope to the Poor, announcing life in its fullness and denouncing the poverty and repression that brought death to so many of his beloved

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<sup>216</sup> Sobrino, *No Salvation Outside the Poor*, 70.

<sup>217</sup> Ibid.

<sup>218</sup> Oscar Romero was born in Ciudad Barrios, San Miguel, in the eastern part of San Salvador on August 15, 1917. After his basic education, and other studies in the seminaries in San Miguel and San Salvador, he was ordained in Rome on April 4, 1942. He returned to El Salvador for the parish work. In 1974, he became bishop of Santiago de Maria in Usulután and then in 1977 he was installed as archbishop of San Salvador. Three years later in March 24, 1980, Archbishop Oscar Romero was brutally assassinated. (See Marie Dennis, Renny Golden and Scott Wright, *Oscar Romero: Reflections on His Life and Writings* (Maryknoll, NY: Orbis, 2003), 9-10.) He was beatified on May 23th, 2015 by Card. Angelo Amato in El Salvador and canonized on October 14<sup>th</sup>, 2018 by Pope Francis.

<sup>219</sup> Ibid.

<sup>220</sup> Marie Dennis, Renny Golden and Scott Wright, *Oscar Romero*, 32. Romero was canonised by Pope Francis on Sunday 14<sup>th</sup>, October 2018 at Rome.

people.”<sup>221</sup> Sobrino affirms that a total identification with people, their sufferings and total trust in the mystery of God, as God of the Poor, shaped Romero’s identity.<sup>222</sup>

This closeness of Archbishop Romero to the Poor influenced Sobrino’s thinking. The Jesuit theologian states: “from the theological dynamic of ‘from among the Poor,’ there developed also a rethinking of the locus from which salvation comes. In this way we arrived at the formula *extra paupers nulla salus* (outside the Poor there is no salvation).”<sup>223</sup>

Regarding the relationship between salvation and the Poor, Sobrino considers that the Poor are the setting from where salvation comes. This does not mean that there is automatically salvation with the Poor, but that salvation cannot operate without them. If there is a mystery to fully understand the human being, there is also the mystery in the understanding of salvation. There are some elements of life that are not mysterious such as famine.<sup>224</sup> So, the formula ‘there is no salvation outside the Poor’ is also mysterious.<sup>225</sup> All ideas and arguments put forward are not enough to describe it.

For him, the formula is a challenge for the theological reasoning because it does not appear in any modern thinking. Sobrino recognizes the complexity of the formula and acknowledges that it is not obvious to affirm that salvation comes from the non-enlightened, and the Poor. He refers to the so-called ‘*mysterium iniquitatis*’ or the mystery of evil in the world of the Poor.<sup>226</sup> For example, Sobrino points out selfishness in the world of the Poor and the contamination of their imagination by the wealthy world. So,

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<sup>221</sup> Ibid., 38.

<sup>222</sup> Jon Sobrino, *Witnesses to the Kingdom: The Martyrs of El Salvador and the Crucified Peoples* (Maryknoll, NY: Orbis, 2003), 181.

<sup>223</sup> Sobrino, *No Salvation outside the world*, 71.

<sup>224</sup> Sobrino, *The Eye of the Needle*, 42.

<sup>225</sup> The next chapter will be dedicated to the critique of Sobrino’s theological thoughts. It will be the occasion to analyse the so-called ‘mystery of the Poor’ as a limit to the understanding of the formula ‘there is no salvation outside the Poor.’ Talking about ‘The mystery of the Poor’, Sobrino notes that he is not naïve of the presence of the evil in the world of the Poor. However, he keeps repeating that the Poor are the setting of Salvation. (Sobrino, *No Salvation outside the world*, 72.)

<sup>226</sup> Ibid., 44.

Sobrino recognizes that the Poor are not always saints because they can kill each other among themselves.<sup>227</sup> The mystery of evil could easily be compared to what Saint John Paul called the ‘structures of sins’. This *mysterium iniquitatis* reigns in the world and it is also found in the world of the Poor. It is from this perspective that Sobrino speaks about the complexity of the formula ‘*Extra Pauperes Nulla Salus*’. For him, there is a danger of idealizing the option for the Poor and this danger is permanent for those who are committed to the Poor.

Sobrino mentions that another difficulty in understanding the formula ‘there is no salvation outside the Poor’ comes from its theological novelty. He suggests a new logic because those from the world of wealth have something to receive from the Poor and because the Poor “are the ones who humanise and offer salvation, the ones who inspire and encourage to create a civilisation of solidarity, rather than selfishness”.<sup>228</sup>

This new logic is inspired by the Bible. In the Biblical tradition, the historical and social dimensions of Salvation appear as the Kingdom of God incarnated in the flesh, a new heaven. Jesus’ life in the Bible emphasizes his littleness. It highlights what Nathanael said about the place where Jesus grew up. He comes from Nazareth, which is a small village from where nothing good can come (Jn 1:46). Sobrino quotes the passage from Saint John's prologue to show that the Word was made flesh (John 1:14). From this quotation, Sobrino raises the question whether the Poor have been good news for Jesus. He states: “that is why we can ask if there are any indications as to whether Jesus was not only salvation for others himself; but whether - as well as his Father in heaven - others, the Poor of the Earth, were salvation and good news for him”<sup>229</sup>

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<sup>227</sup> Sobrino, No Salvation outside the world, 72.

<sup>228</sup> Ibid., 48.

<sup>229</sup> Ibid., 50.

The question here is: How can the Good News *par excellence* be evangelised? If Jesus is considered as Good News Himself, can it be said as Sobrino questioned, that in his encounters with the Poor and the oppressed, He was evangelized by them? Sobrino, inspired by the passage of Mt 11:25, asked whether Jesus was just full of joy or “did he feel that he himself was being evangelised by those little people”.<sup>230</sup> Sobrino does not give any real answer to this question but he is convinced that “in order to become a God of salvation the Most High came down into our history and he did so in two ways: he came down into the human, and within the human, he came down to what is humanly weak.”<sup>231</sup>

Sobrino highlights four kinds of salvation: personal, social, historical, and transcendent salvation. He does not establish a border between these kinds of salvation. Neither does he define all the kinds of salvation, but he focuses on two types of salvation: historical and social salvation of a society that is very sick. In the process of historical and social salvation, Sobrino notes that there is a dialectic and this dialectic often produces conflict because it occurs in opposition to other realities. According to him, we find salvation in concrete social life. He defines historical and social salvation in the following way:

Salvation is life (satisfaction of basic needs), as against poverty, illness and death; it is dignity (respect for persons and their rights), as against oppression; salvation is fellowship among human beings, brought together as a family, as against the Darwinian view that regards humanity as a mere species; salvation is fresh air which the spirit can breathe in its movement towards the human (honesty, compassion, solidarity, openness to some form of transcendence), as against what is dehumanising (selfishness, cruelty, individualism, arrogance).<sup>232</sup>

Sobrino also underlines three forms of salvation coming from the world of the Poor. Firstly, salvation as a way of overcoming dehumanisation; Secondly, salvation as

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<sup>230</sup> Ibid.

<sup>231</sup> Ibid., 51.

<sup>232</sup> Ibid., 54-55.



positive humanising factors to accomplish good things and Thirdly, salvation as universal solidarity.<sup>233</sup>

Firstly, Sobrino uses the theme of conversion to explain the first form of salvation, which implies overcoming dehumanization. This theme of conversion is rooted in the biblical tradition and the words, which express it in Hebrew are *Naham* and *shub*. In Greek, the word referring to conversion is *metanoia*. This word implies a radical change of direction and repentance. It is turning back from sins to God.<sup>234</sup> For Sobrino, the Poor can help others to be converted. He argues that the theme ‘conversion’ is essential to explain his formula and it is the main emphasis of the formula *extra paupers nulla salus* because “apart from the Poor there is no easy way of being converted. The non-Poor can see the huge sufferings of the Poor and the world’s cruelty towards them. They can compare their own comfortable life with the lives of the Poor, especially if they have come to think of their manifest destiny and can recognize their sin.”<sup>235</sup>

For Sobrino, the Poor shed light on the world of abundance so that the world of abundance might see the truth and thus progress towards the whole truth. The main good thing that the Poor invite us to do is to speak out truthfully and prophetically. To do so easily, we need to relate to their reality. The Poor help the world of abundance to be moved to compassion and to work for justice.

Secondly, to explain the salvation as positive humanising factors to accomplish good things, Sobrino refers to the Kantian question "what can I hope for?"<sup>236</sup> For him, the poor bring not only hope but also utopia. For the Poor, “utopia is life of dignity and justice.”<sup>237</sup> Moreover, Sobrino considers the Poor as bearers of hope in the world of

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<sup>233</sup> Ibid., 59.

<sup>234</sup> Walter E. CONN, “Conversion” in *A Dictionary of Christian Spirituality* (London: SCP Press, 1983), 96.)

<sup>235</sup> Sobrino, *The Eye of the Needle*, 59.

<sup>236</sup> Ibid., 60.

<sup>237</sup> Ibid.

abundance. The Poor have “a faith that overcomes darkness and a hope that triumphs over disappointment.”<sup>238</sup> He also suggests creating economic, political and cultural models to overcome poverty, but this creation must be sure to be human. The Poor have remarkable values such as ecological awareness and solidarity, which can contribute to building a more human society.

Thirdly, Sobrino defines solidarity as “those who are unequal carrying each other. Solidarity means the Poor and the non-Poor carrying each other, giving to one another and receiving from one another the best we have, so as to become one with one another”.<sup>239</sup> As the Poor are also the victims, they contribute to the liberation process through redemption. Sobrino thinks that in the process of salvation, there are many evils to eliminate and the process of doing so is called redemption. According to him, it is the price we pay to heal our sinful world. What is the role of the Poor as victims in this process? Sobrino answers that by their suffering the Poor can disarm the power of evil historically. For Sobrino, “innocent victims save by moving us to conversion, impelling us to honesty, hope and active solidarity. Even amid such horrors they produce immediate and tangible fruits of salvation.”<sup>240</sup>

Sobrino is aware that his phrase “outside the Poor there is no salvation” can be controversial.<sup>241</sup> That is why he introduces in his theology the notion of non-Poor. The non-Poor are mostly understood here as the world of abundance. For him, the non-Poor shall cooperate in the healing of the sick world. However, this can be done only on one condition. It is necessary that the non-Poor share not only spiritually the world of the Poor but also have good intentions. In addition, the non-Poor can become prophetic figures that

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<sup>238</sup> Ibid., 62.

<sup>239</sup> Ibid., 65.

<sup>240</sup> Ibid., 69.

<sup>241</sup> As mentioned previously, the bone of contention is that the Poor are not exempt of evil, they are not the saints. If the Poor are not the saints, can they be considered massively as setting of salvation for the non-Poor? This will be analysed deeply in the next chapter.

help the Poor to regain their confidence and develop actions that inspire hope. The condition for the world of abundance to be the place of salvation is to purify itself from ambiguity and heal its sinfulness.<sup>242</sup> This statement of the Jesuit theologian can be controversial.<sup>243</sup> The question here is: is the so-called ‘world of the Poor’ exempted from sin? Previously Sobrino acknowledged that salvation does not come automatically for the Poor and he underlined the existence of the mystery of evil in the world of the Poor. Even so, he persists and states that “the world of the non-Poor has potential to do both those things: offering general ethical, humanist and religious proposals. Nevertheless, the most radical possibility, without which no others usually suffice, is to go down into the Poor in history.”<sup>244</sup>

### **2.4.3 The Church of the Poor**

Describing the Church of the Poor, Sobrino notes that in recent years in Latin America, Christ has appeared, and He has granted many Christians the grace of ‘seeing’ him in the Poor. For him, “these visionaries have become, along with the visionaries of New Testament, ‘witnesses’ who are ready for a new mission that will shape a new Church.”<sup>245</sup> The Church of the Poor takes its departure from this revelation and the Spirit of Jesus present in the Poor.

This Church must find in the Poor the principle of its structure, organization and mission. The Poor should be the ‘centre’ of the whole.<sup>246</sup> As the centre of the whole Church, the Poor constitute the authentic theological source for understanding Christian truth and practice. They are a permanent challenge for the Church in facing its basic

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<sup>242</sup> Ibid., 73.

<sup>243</sup> The next chapter will examine this controversy in Sobrino’s reflection on the relationship between the Poor and salvation.

<sup>244</sup> Ibid., 74.

<sup>245</sup> Jon Sobrino, *The True Church and the Poor* (Oregon: Wipf and Stock, 1985), 91.

<sup>246</sup> Sobrino, *The True Church*, 93.

theological problems and even the direction in which the solution to the problems should be found. For Sobrino,

When the Poor are at the centre of the Church, they give direction and meaning to everything that legitimately (by the standard of Christian tradition) and necessarily (by the standard of the structure of any association of human beings) constitutes the concrete Church: its preaching and activity, its administration, its cultural, dogmatic, theological, and other structures. The Poor in no sense cause a 'reduction' of ecclesial reality but rather are a source of 'concretization' for everything ecclesial.<sup>247</sup>

In other words, today as in the days of Isaiah and Jesus, the Poor are those to whom the Good News is primarily addressed. Sobrino concludes that the Spirit is present in the Poor *ex opera operato*.<sup>248</sup> From this point of view, the Spirit manifests itself in the Poor and it implies that they are structural channels for finding the truth of the Church and give the direction and the content of its mission. The consequence of the formula mentioned above is that the Poor in the Church are the structural source that helps the Church to be the agent of truth and justice.<sup>249</sup> For Sobrino, the Poor by their presence in the Church prevent the manipulation of realities such as the question of God, his kingdom, Christ, love, justice and sin.

The Poor challenge the understanding of those realities and they even provide the epistemological standpoint from which the Church understands the resurrection.<sup>250</sup> Finally, the concept of the 'church of the Poor' means "that the entire Church should migrate to the periphery and share the powerlessness of the Poor at the feet of a crucified God, so that it might there cultivate Christian hope and develop effective activity".<sup>251</sup> Sobrino advocates that Matthew 25 should be brought into ecclesiology because it will

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<sup>247</sup> Ibid., 94.

<sup>248</sup> Ibid., 95. In sacramental theology, the term *ex opera operato* "refers to the belief that whenever the essential elements of the rite are carried out by a minister with a serious intention, the action, because it involves the agency of the risen Christ and his Spirit, possesses intrinsically the power of transforming people by grace." (Bernard Cooke, "Sacraments," in *The New Dictionary of Sacramental Worship* (Ed. Peter E. Fink; Dublin: Gill and Macmillan, 1990), 1119.

<sup>249</sup> Ibid.

<sup>250</sup> Ibid., 97.

<sup>251</sup> Ibid., 98.

help to specify not only other kinds of presence of Christ but also to specify in a Christian way the holiness, catholicity and apostolicity of the Church.<sup>252</sup>

Jon Sobrino also defines the Church of the Poor by referring to the second chapter of the Dogmatic Constitution *Lumen Gentium* on the People of God. He believes that the understanding of the Church of the Poor goes beyond the understanding of the term people of God. However, the question arises concerning the relationship between this second chapter of *Lumen Gentium* devoted to the people of God and the Church of the Poor according to Sobrino. He answers that the concept of ‘the people of God’ as the ‘Church of the Poor’ was raised in the framework of Vatican II. For him the text on the people of God has prepared the way to approaching the design of the Church of the Poor. This is evident by the rejection of the pyramidal conception of the Church in favour of the Church as God's people.

Sobrino also underlines that the design of the Church of the Poor goes beyond a Church that shows concern for the Poor. Even though the option for the Poor is part of the Church’s mission, Sobrino maintains that the Church of the Poor is different. For him, sometimes the Church’s option for the Poor remains at the ethical level but it does not emphasise the ecclesiological dimension in a way that makes it its principle and configuration.<sup>253</sup>

Sobrino goes further to designate the Church of the Poor as the Church constituted by the real Poor individually and collectively. This poverty is not only natural but linked with their historical condition. It is relevant to recall that Sobrino’s writings on the Poor were inspired by the context of Latin America and especially the situation of San Salvador where extreme material poverty and oppression occurred. Sobrino notes how most of the

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<sup>252</sup> Ibid., 100.

<sup>253</sup> Ibid., 135.

people of the Church of Latin America are poor and also how poverty shapes the configuration of the ecclesial community in comparison to Churches of the so-called developed countries.<sup>254</sup>

Sobrino suggests this understanding of the Church of the Poor by referring to the Beatitudes, which propose lowering and emptying oneself as Christ in the *kenosis*. It means that any commitment of the Church to the Poor requires identification with them. This conception of the Church of the Poor based on the *kenosis* of Christ strengthens the spiritual foundations of the Church itself, which accepts voluntary poverty. This also implies the adoption of an attitude of solidarity with the Poor and even to enduring the persecutions that follow from this solidarity with the Poor. Regarding persecutions, it recalls here the divisions, which occurred in the Church in Latin America after Medellin because of the accusations against the Church of being Marxist and the martyrdom that followed. For Sobrino, the danger is real, and this danger cannot be overcome without reference to the *kenosis* of Christ.<sup>255</sup> Those who have died because of their solidarity with the Poor through the persecution of the Church are called the ‘Witness of the Church in Latin America’.<sup>256</sup>

## 2.5 CONCLUSION

This chapter divided into two sections set out to explore Sobrino’s Christology, his understanding of the poor and his relation to Liberation Theology.

Firstly, it emerged that Sobrino’s Christology. is built within the context of El Salvador from the life of the poor and the oppressed. Sobrino’s Christology is ecclesial because it is based on the life and praxis of the local communities of El Salvador. His Christology is historical in the sense that it reflects on Christ himself and analyses the

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<sup>254</sup> Ibid.

<sup>255</sup> Ibid., 137.

<sup>256</sup> Ibid., 160.

content of Christology. It implies that his methodology puts the emphasis on the historical Jesus. Sobrino's Christology is also trinitarian. Sobrino gives credit to the Latin American Liberation theology.

In addition, his conception of Liberation theology takes as a starting point the historical Jesus. He also uses the cry of the Poor and the oppressed as theological *loci* for his theology. For him, Liberation theology is the theology of salvation as liberation. Moreover, the theme of the Reign of God is central to Sobrino's Liberation theology. Sobrino puts the emphasis on the reality of the victims in his Liberation theology. His Liberation theology insists that all theology must participate in the primary reaction, which is compassion in a suffering world. His Liberation theology understands itself as *intellectus amoris* because it also considers love, justice and mercy as *loci* where it engages reflection. Above all, Sobrino's Liberation theology embraces the whole reality of revelation even though there are many theological *loci*.

Secondly, Sobrino's understanding of the poor is inspired by the Latin American context of material poverty and oppression. It is inseparable from his Christology rooted in the irruption of the Poor in the South American theology after Vatican II. This irruption of the Poor in the Latin American theology gave rise to a specific image of Christ as liberator. For him, the mystery of God and Christ was revealed in relationship to the poor of the world. That is why the poor are the setting from where salvation comes. This consideration of the poor led him to affirm that 'there is no salvation outside the Poor.' This chapter also explored the historical development of this statement in his writings but also questioned the place of the non-poor in Sobrino's theology. The non-Poor represent the world of abundance and Sobrino argues that, they cooperate in salvation and in the process of healing a sick world. For him they can be the prophetic figures to help the Poor

to develop actions that inspire hope. However, the world of abundance must purify itself from ambiguity and heal its sinfulness.

This second section also explored the meaning of the ‘Church of the Poor’ in Sobrino’s writings. The Poor are central to the theological understanding of the Church. So, the ‘Church of the Poor’ means that the universal Church should migrate to the periphery and share the life of the Poor. The ‘Church of the Poor’ understands herself by referring to the Beatitudes because they suggest humbling and emptying oneself like Christ in the *Kenosis*. The consequence would be that the Church identifies herself with the Poor and accepts voluntary poverty. It implies solidarity with the Poor and acceptance of martyrdom.

As a Jesuit, Sobrino accepted voluntary poverty. However, his understanding of the Church of the Poor as the theological setting of his Christology is not accepted by all and especially by the Magisterium. That was one of the controversial points of the Notification of the CDF on two of his books in 2006. The next chapter on the critique of Sobrino’s theological thought, will also analyse in depth the text of the Notification to him in which the CDF implies clearly that “The ecclesial foundation of Christology may not be identified with “the Church of the Poor”, but is found rather in the apostolic faith transmitted through the Church for all generations.”<sup>257</sup>

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<sup>257</sup> Congregation for the Doctrine of the Faith, “Notification on the works of Father Jon Sobrino: Jesuscristo liberator: Lectura historico-teologica de Jesus de Nazaret and La fe en Jesuscristo. Ensayo desde las victimas,” Available at [http://www.vatican.va/roman\\_curia/congregations/cfaith/documents/rc\\_con\\_cfaith\\_doc\\_20061126\\_notification-sobrino\\_en.html](http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_20061126_notification-sobrino_en.html) (accessed 27/10/2016).



## CHAPTER THREE

### CRITIQUE OF SOBRINO'S THEOLOGICAL THOUGHT ON THE OPTION FOR THE POOR

#### 3.1 INTRODUCTION

This chapter, with the aim of assessing critically Sobrino's theological thought and showing the complexity of his understanding of the concept 'poor', has three sections.

The first section focuses on some difficulties to understanding the place of the Poor and non-Poor in Sobrino's theology of salvation. It highlights the controversial understanding of his formula: "There is no salvation outside the Poor." Sobrino is keenly aware that this formula can be contentious. For instance, one of the divisive points of the understanding of his formula is the presence of evil in the world of the Poor. Moreover, he also invites his readers to understand this formula by referring to mystery. Since it is a mystery, a proper and full grasp of it cannot be achieved through words or concepts alone. Besides, he also situates the understanding of his formula firmly in the context of Liberation theology. A few years ago, the Magisterium raised the alarm on the controversial understanding of the option for the Poor in Liberation theology.

The second section explores the controversial relationship between Liberation theology and the CDF. It analyses the two documents entitled *Libertatis Nuntius*, of 1984 and *Libertatis Conscientia* in 1986<sup>258</sup>. The former, also called *Instruction on Certain Aspects of the 'Theology of Liberation'*, intended to draw the attention of the Church to the deviations or risk of deviations by Liberation theology. The main accusation was the use of Marxism by this theology in its response to the preferential option for the Poor.<sup>259</sup> The latter was much more positive and was issued to complete the first one. In fact, "the

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<sup>258</sup> A significant commentary on this document was made by the Jesuit Alfred Hennelly who points out the controversy caused by the document among theologians and suggests new contributions to Catholic Social Thought. (Alfred Hennelly, *Theology for a liberating Church. The New Praxis of Freedom* (USA: Georgetown University Press, 1989), 105-117.

<sup>259</sup> Denys Turner, "Marxism, Liberation Theology and the way of negation," in *The Cambridge Companion to Liberation Theology* (ed. Christopher Rowland; Cambridge: Cambridge University Press, 2007), 229.

Instruction on *Certain Aspects of the 'Theology of Liberation'* makes no claim to completeness. It says that another document is being prepared, which will detail in positive fashion the great richness of this theme for the doctrine and life of the Church.”<sup>260</sup> Therefore, the analysis of the two Vatican Instructions sets the scene for the study of the Notification of the CDF to Sobrino (on two of his books) in 2006 in the third section.

This third section consists of four sub-sections: the first, reviews the two books entitled *Jesucristo liberador: Lectura histórico-teológica de Jesús de Nazaret* and *La fe en Jesucristo: Ensayo desde las víctimas*. The second sub-section focuses on the brief presentation of the Notification. On its part, the third sub-section, analyses the reply of Sobrino to the CDF through his General Superior, Father Kolvenbach. The analysis of this response to the CDF will clarify how the Jesuit theologian refused to adhere to what he considered an oppressed and unjust structure (CDF). In the final sub-section, the reactions to the Notification by other theologians and especially the document of the International Theological Commission of the Ecumenical Association of Third World Theologians entitled: *Getting the Poor Down From the Cross: Christology of Liberation*,<sup>261</sup> are explored.

### **3.2 SOBRINO'S THEOLOGY OF SALVATION AND THE POOR**

One of the pillars of Sobrino's theological thought is the relationship between the Poor and salvation. The Poor are those who bring humanisation and salvation to the non-Poor. Sobrino summarizes it by the formula *extra pauperes nulla salus* or 'there is no salvation outside the Poor'. However, he is aware that this formula can be controversial. For example, the language used by Sobrino to explain his formula is not clear. Moreover,

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<sup>260</sup> Peter Hebblethwaite, "Liberation Theology and the Roman Catholic Church," in *The Cambridge companion to Liberation Theology* (ed. Christopher Rowland; Cambridge: Cambridge University Press, 2007), 220.

<sup>261</sup> This document is published online. The second digital edition (Version2.0) translated in English will be used in this research.

when explaining the formula, he states: “We are not saying that with the poor there is automatic salvation; we claim only that without them there is no salvation – although we do presuppose that in the poor there is always ‘something’ of salvation.”<sup>262</sup> The question to Sobrino here is: if he presupposes that in the poor there is always ‘something’ of salvation, does it not allow to also ‘presuppose’ that in the so-called non-poor there is always ‘something’ of salvation?

Another limitation of this formula comes from the fact that he chooses to explain the formula through ‘mystagogy’ or ‘interpretation of the mystery’<sup>263</sup> He is aware of the existence of the *mysterium iniquitatis* and that the mystery of evil is present among the Poor. He notes: “For me personally, the major difficulty lies in the fact that even the world of the poor is invaded with the *mysterium iniquitatis*.”<sup>264</sup> Sobrino invites his readers to enter into the mystery of the Poor. For him, the poor place his readers before the mystery and the Poor themselves express a mystery.<sup>265</sup> He identifies two kinds of mysteries in the world of the poor: the *mysterium iniquitatis* and the *mysterium salutis*.

The *mysterium iniquitatis* as already defined is the mystery of evil. Sobrino realises that it is also present in the world of the Poor. As human beings, the Poor have inadequacies such as selfishness, which is part of every human being. In the world of the Poor, these deficiencies are “abuse, rape, gross machismo, massacre, and sometimes larger human catastrophes.”<sup>266</sup> With this then, following Sobrino’s reasoning, there is always something to be saved in the world of the poor. He explains the *mysterium salutis*

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<sup>262</sup> Ibid.

<sup>263</sup> For Jeffrey P. Baerwarld, “the term mystagogy means the interpretation of mystery. (...) It later becomes associated with the teaching of mysteries found in secret religions. In the early Christian tradition, the katecheseis mystagogikai refers to the post-baptismal catechesis delivered to the neophytes during the ‘week of white robes.’” (Jeffrey P. Baerwarld, “Mystagogy,” in *The New Dictionary of Sacramental Worship* (Ed. Peter E. Fink; Dublin: Gill and Mcmillan, 1990), 881.)

<sup>264</sup> Sobrino, *No Salvation outside the world*, 49.

<sup>265</sup> Ibid., 72.

<sup>266</sup> Ibid., 73.

by what he calls “primordial holiness”<sup>267</sup>. Sobrino describes the desperate situation of the Poor in Latin America, Asia, and Africa who had suffered from oppression and war as heroic. Despite their situation, those people are still capable of resistance and celebration. In the refugee camps, it is still possible to find “tales of love, of hope, of longing to live and help of others.”<sup>268</sup> This is what Sobrino calls ‘primordial holiness’ or *mysterium salutis*. The question to Sobrino here can be: can we find primordial holiness in the non-poor?

Finally, for Sobrino, the full understanding of the formula ‘there is no salvation outside the poor’ hangs on the capacity of his readers to immerse themselves into the very mystery of the Poor. However, as we all well know, mystery by nature does not give itself entirely. The mystery is always beyond the concept. And since this is the case, how can Sobrino be sure that the Poor are the only setting of salvation? Can this not be also said of the non-poor? Nevertheless, Sobrino invites his readers also to understand the formula in the context of Liberation theology. For him, the formula does not only appear in Liberation theology, but instead it is coherent with it.<sup>269</sup> History has shown that some of the views of Liberation theology are not shared by all, especially the Magisterium. The next section examines this contentious relationship between the Magisterium and Liberation theology based on the two documents of the CDF on Liberation theology in 1984 and 1986.

### **3.3 MAGISTERIUM AND LIBERATION THEOLOGY**

This section examines the debate on the option for the poor and Liberation theology viewed from the perspective of the Magisterium. The first part presents the Instructions of the Congregation for the Doctrine of Faith, *Libertatis Nuntius*, in 1984 and *Libertatis*

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<sup>267</sup> Ibid.

<sup>268</sup> Ibid., 74.

<sup>269</sup> Ibid., 69.

*Conscientia*<sup>270</sup> in 1986. The first one, *Instruction on Certain Aspects of the 'Theology of Liberation'*, intended to draw the attention of the Church to the deviations or risk of deviations of Liberation theology. The main accusation was the use of Marxism by this theology in its response to the preferential option for the Poor.<sup>271</sup> The second Instruction was much more positive and was issued to complete the first one.<sup>272</sup> The second part focuses on the theological debate generated by the previous two Instructions. These instructions have been criticized by several theologians throughout the world and more precisely in Latin America. Some have seen the first instruction of CDF as a way not only of emphasizing the authority of the Church but also as a way of muzzling liberation theologians and Liberation theology itself.

### **3.3.1. Presentation of *Libertatis Nuntius* and *Libertatis Conscientia***

#### **3.3.1.1 Presentation of *Libertatis Nuntius***

The *Libertatis Nuntius* (hereafter LN) Instruction contains 11 sections. In the introduction, the Instruction recalls that liberation is primarily liberation from the servitude of sin. Also, the Gospel is the message of liberation *par excellence* and it overflows with this force of liberation. The CDF also mentions the purpose of the Instruction, which intends

to draw the attention of pastors, theologians, and all the faithful to the deviations, and risks of deviation, damaging to the faith and to Christian living, that are brought about by certain forms of Liberation theology which use, in an insufficiently critical manner, concepts borrowed from various currents of Marxist thought.<sup>273</sup>

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<sup>270</sup> A significant commentary on this document was made by the Jesuit Alfred Hennelly who points out the controversy caused by the document among theologians and suggests new contributions to Catholic Social Thought. (Alfred Hennelly, *Theology for a liberating Church. The New Praxis of Freedom* (USA: Georgetown University Press, 1989), 105-117.)

<sup>271</sup> Denys Turner, "Marxism, Liberation Theology and the way of negation," in *The Cambridge Companion to Liberation Theology* (ed. Christopher Rowland; Cambridge: Cambridge University Press, 2007), 229.

<sup>272</sup> Peter Hebblethwaite, "Liberation Theology and the Roman Catholic Church," in *The Cambridge companion to Liberation Theology* (ed. Christopher Rowland; Cambridge: Cambridge University Press, 2007), 220.

<sup>273</sup> CDF, "Instruction *Libertatis Nuntius*: Instruction on certain aspects of the

In the first section, the CDF recognizes that the aspiration of people to liberation is one of the main signs of the times. Consequently, the duty of the Church is to scrutinize and interpret it in the light of the Gospel (LN I, 1). In its second section, the CDF particularly notes the urgency of enlightening and guiding the expressions of this aspiration of peoples to freedom. This requires discernment because “the aspiration for justice often finds itself the captive of ideologies, which hide or pervert its meaning.” (LN II, 3).

In the third section, the CDF shows that the aspiration to freedom finds echo in the hearts and minds of Christians. It is in consonance with this aspiration that the theology of liberation was first conceived in Latin America and then in other regions of the Third World as well as some countries of the industrialized world. The Instruction uses both the expressions ‘theology of liberation’ and ‘theologies of liberation’ without making any distinction. It is written that “‘Theology of Liberation’ refers first of all to a special concern for the poor and the victims of oppression, which in turn begets a commitment to justice.” (LN III, 3) It is also a theological reflection with special attention to the biblical themes of liberation with practical implications (LN III, 4).

The CDF dedicates its fourth section not only to the biblical foundations of Christian freedom but also to the biblical foundations of the theology of liberation. From the outset, the CDF stresses the liberation from sin in Christ as a radical element of Christian freedom. To support its argument, the Instruction quotes the biblical passage of Gal 5: 1. The CDF refers to Ex 24 as the biblical foundation of ‘liberation theologies’ and stated that the Exodus event was fundamental in the formation of the Jewish People. That is why it should be understood in relation not only to the foundation of the people of God

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“Theology of liberation,” available at [http://www.vatican.va/roman\\_curia/congregations/cfaith/documents/rc\\_con\\_cfaith\\_doc\\_19840806\\_theology-liberation\\_en.html](http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_19840806_theology-liberation_en.html) (accessed 26 January 2017), & 4.

but also in relation to the worship of the Covenant celebrated at Mount Sinai (LN IV, 3). In this sense, the book of Exodus cannot be interpreted primarily and exclusively from a political perspective. The Instruction equally made reference to the prophets in the Old Testament such as Amos who unceasingly preached about the demands of justice and solidarity.

In the New Testament, the Instruction refers to the Beatitudes, but at the same time it presents conversion as essential for the search for justice. The Instruction also quoted another biblical passage in Luke 10: 25-37. This text is the parable of the Good Samaritan. The CDF recalls that “the commandment of fraternal love extended to all humankind thus provides the supreme rule of social life.” (LN IV, 8). This is also the meaning of Mt 25: 31-46 in which Our Lord invites his disciples to show solidarity with all who are in distress (LN IV, 9). The CDF concludes, as mentioned at the beginning of this section, that liberation is above all liberation from sin.

In the fifth section, the Instruction places the emphasis on the Social Teaching of the Church. Some of the documents on justice and the option for the Poor of the Magisterium are quoted such as *Mater et Magistra* and *Pacem in terris*. The Instruction refers to three other documents of Pope Paul VI: *Populorum progressio*, *Evangelii Nuntiandi* and *Octogesima Adveniens*. The CDF recalls that the Second Vatican Council also addressed the issue of justice and freedom in the Pastoral Constitution *Gaudium et Spes*. The CDF made further allusions to and exploration of several other documents of Pope John Paul II including *Redemptor hominis*, *Dives in Misericordia*, *Laborem Exercens* and his speech delivered at the XXXVI General Assembly of the United Nations on October 2, 1979 and the opening of the 3rd CELAM Conference in Puebla the same year. The CDF then remarks that the Synod of Bishops in 1971 and 1974 dealt with the Christian conception of liberation (LN V, 5). It was this same concern that

prompted the Church to create the Pontifical Commission for Justice and Peace in 1967. Moreover, reference is made to the documents resulting from the conferences of Medellin in 1968 and Puebla in 1979. The majority of the texts of the Magisterium cited previously were studied in the first chapter of this research.

In the sixth section of the Instruction, the CDF denounces the new interpretation of Christianity in the theology of liberation. It shows that in the face of the urgency for bread, there is a temptation to postpone evangelization because “some are tempted to put evangelization into parentheses, as it were, and postpone it until tomorrow: first the bread, then the Word of the Lord.” (LN VI, 3) There is a danger of reducing the Gospel to a simply earthly gospel. In this sense, liberation theologies adopt positions that are sometimes incompatible with faith. Liberation theology uses the “Concepts uncritically borrowed from Marxist ideology and recourse to theses of a biblical hermeneutic marked by rationalism are at the basis of the new interpretation, which is corrupting whatever was authentic in the generous initial commitment on behalf of the poor.” (LN VI, 10).

The previous reasons led the Instruction in its seventh section to analyse the method used by the theology of liberation, the so-called Marxist analysis. The CDF recalls that this method had already been condemned by Pope Paul VI because it is a method that assures class-struggle as inevitable and implies a totalitarian perception of society (LN VII, 7). The CDF also recalls that “atheism and the denial of the human person, his freedom and rights, are at the core of the Marxist theory” (LN VII, 9). The CDF emphasises that theologians must make use of the critical analysis of methods borrowed from other disciplines (LN VII, 10 & 13).

Section eight describes the ugliness of Marxist ideology. The CDF shows how the use of this method can lead not only to the subversion of the sense of truth but also to violence. The Instruction describes how, in Marxist logic, analysis cannot be dissociated



from praxis. Consequently “the truth is a truth of class: there is no truth but the truth in the struggle of the revolutionary class” (LN VIII, 5). Truth is totally subverted in the sense that “praxis and truth are partisan” (LN VIII, 5). This conception of praxis and of truth has consequences for the theological reflection of liberation theologians. This will be demonstrated in the ninth section.

In the ninth section, the CDF explains the theological consequences of the Marxist conception of reality of the theologians of liberation. For example, the Eucharist is considered by liberation theologians as a celebration of the struggling people (LN IX, 1). Moreover, class struggle is not only the engine of history but also God is identified with history (LN IX, 3, 4). Theological virtues such as Faith, Hope and Charity are themselves “‘fidelity to history’, ‘confidence in the future’, ‘option for the poor.’” (LN IX, 5) In addition, the Church becomes a reality of history and the theologians of liberation develop critiques against the structures of the Church (LN IX, 13).

The tenth section highlights the contentious relationship between the Magisterium, liberation theologians and Liberation theology. The Instruction affirms that it is extremely difficult to reach a real dialogue with certain theologians of liberation (LN X, 2, 3). Several other things are condemned by the CDF in the theology of liberation such as: the substitution by the theology of liberation of orthodoxy by orthopraxy and the use of orthopraxy as a criterion of truth; the rejection of the doctrine of the Church; the political re-reading of Scripture and the canticle of magnificat; the fact that theology of liberation gives credit to temporal messianism; the remark that theology of liberation deviates from tradition by setting aside the interpretation advocated by the magisterium (LN X, 4-8)

The Vatican Instruction dedicates its eleventh section to some concrete orientations. The CDF maintains that the evangelizing task must be taken in its entirety

and it is only within this framework that human promotion and all authentic liberation can be understood. The search for justice should be done by referring to the truth of man created in the image of God and this requires that this fight for justice be conducted with means conforming to human dignity. The search for justice should always refer to the ethical capacities of the human person and on the need for conversion. The Instruction invites theologians of liberation to return to the Social Teaching of the Church, which already provides broad ethical guidelines for the commitment to justice and the option for the Poor.

To recapitulate, the previous section summarized the 11 parts of the first Vatican Instruction entitled *Libertatis Nuntius on Certain aspects of Liberation Theology*. For the CDF, liberation firstly meant liberation from the bondage of sin. Secondly, the aspiration of people to liberation was one of the signs of the times. It is the mission of the Church to guide and to enlighten this aspiration. Thirdly, the aspiration for freedom also found echo in the hearts and minds of Christians. Fourthly, the Instruction underlined the urgency of a better interpretation of the book of Exodus because Liberation theology gave a political interpretation not only of the book of Exodus but also of Scripture in general. Fifthly, the CDF suggested that conversion was essential in the search for Justice and highlighted the danger of the new interpretation of Christianity by Liberation theology using the tools of Marxism. The CDF notes that the consequence of the use of the Marxist method led to a reduction of the Gospel to simply the earthly gospel. Finally, the Vatican Instruction suggested some orientations for the search for Justice such as respect of human dignity, the need for conversion, and the use of the Social Teaching of the Church. In the introduction to *Libertatis Nuntius*, the CDF announced its intention of developing in subsequent documents the themes of Christian freedom and liberation. Faithful to its promise, the CDF two years later in 1986 issued an Instruction on Christian freedom and

liberation entitled *Libertatis Conscientia* (hereafter LC). The CDF recalled that there was an organic relationship between the two documents and invited the readers to read them in the light of each other (LC 1, & 1). How does the second Instruction generally describe the different themes raised in the first Instruction?

### ***3.3.1.2. Reading of Libertatis Conscientia in the light of Libertatis Nuntius***

An overview of the document shows that it contains 100 numbers and five chapters. A general observation of the document shows that practically every number links to a theme already addressed in the previous instruction. This section will have three parts: the first part will highlight the quest of freedom as a sign of the times and its ambiguities in the modern world. The description of Christian freedom as a sign of the times was already raised in the first Instruction entitled *Libertatis Nuntius*. The current research develops it in relation to the first Instruction. This first part also looks at the ambiguity of Christian freedom and liberation in the modern world. The second part points out the tragedy of sin in the process of human liberation. It develops what is already mentioned in the first Instruction that true liberation is liberation from the bondage of sin. The third part focuses on the Church's mission in the process of liberation. It highlights the mission of the Church in the process of freedom and liberation through its Social Teaching.

#### ***3.3.1.2.1 The Quest for Freedom as a Sign of the Times and its Ambiguities***

The quest for freedom and liberation was already underlined in the first Instruction as one of the major signs of the times of the contemporary world. This second Vatican Instruction goes beyond the first Instruction to consider the quest for freedom and liberation as an inheritance of Christianity (LC 5, & 2). The pursuit for freedom is noticeable from the dawn of modern times with the return to antiquity in philosophy and an emphasis on the science of nature. The search for freedom and liberation was also defined by the domination of nature (LC 6-7). After the attempt to conquer nature, which

resulted in the development of science and technology, other socio-political conquests sprang up. The modern movement of liberation led to the abolition of slavery. This same movement has brought people an inner freedom, which has been translated into a double form: freedom of thought and freedom of will (LC 8-9).

However, the Vatican Instruction notes some ambiguities in the modern process of liberation. This is manifested by the emergence of new forms of servitude and terror. By the blind domination of nature, human beings entered a process of the destruction of their own future. In other words, technological power gave rise to another form of inequality. This inequality was manifested by the fact that those who possess technology possess power not only over the world but also over people (LC 10-12).

Another ambiguity was born in the age of the Enlightenment with the understanding of the subject as autonomous. This understanding of the subject led to an individualistic ideology and favoured inequality in the sharing of wealth during the early industrial era. However, in opposition to individualist ideology another movement was born called collectivism. It was a movement, which assigned a purely terrestrial end to the human person. In conclusion, the liberation movements of the modern age have brought with them new forms of oppression such as totalitarianism and new forms of tyranny, which the Vatican Instruction sees as a danger of destruction of the person.

In addition, the Instruction highlighted a new relationship of inequality between countries with strong technology and those who are deprived of it. The CDF notes that in this context of the modern liberation movement, God was seen as an obstacle because the movement of liberation considers God as an alienation of human beings (LC 10-19). In this perspective, the Instruction proposed a freedom based on the experience of the People of God. This freedom had a double meaning: a salvific freedom, which results in liberation from the bondage of sin and an ethical freedom, which was a restitution of

freedom, an educated freedom (LC 21 -24). Freedom is also linked to Truth and Justice. The Instruction considered Truth and Justice as measures of true freedom. Humankind cannot exist without reciprocal relationship, and the good is the aim of freedom. For this reason, the truth, which directs the will is necessary for freedom (LC 26).

#### *3.3.1.2.2 The Tragedy of Sin in the Process of Freedom and Liberation*

In the first Instruction *Libertatis Nuntius*, the CDF mentioned clearly that liberation was above all liberation from the bondage of sin. In the second chapter of the second Instruction, the CDF generally described the complexity of Christian freedom and liberation, and the influence of sin on human freedom and liberation. The Instruction took as the starting point of its reflection the meaning of freedom. To be free means to enjoy completely full independence. Nonetheless, the human person does not always know what he wants. It was for this reason that the CDF offered the principles of justice and truth as a guide to the understanding of Christian freedom.

These principles were seen as standards for anyone who sought freedom. However, the Instruction does not explain how justice regulates freedom. As happiness was the goal of the search for truth, the human person should strive towards “the supreme good through lesser goods, which conform to the exigencies of his nature and his divine vocation” (LC 27). The Supreme Good lies in communicating with the life of God and entering friendship with God. Since humankind does not have its origin in his individual or collective action but in the gift of life from God, his freedom is a participatory freedom. The authentic freedom of the person lies in obedience to the divine law and the service of justice. The opposite leads to the tragedy of sin.

It was in this perspective that the CDF defined Christian freedom and liberation in relation to liberation from the bondage of sin. Sin was a source of division and oppression. By breaking off his relationship with God, humankind became alienated and destroyed.

Indeed, the sin that alienated the human person was the root of the other evils. This was also manifested in idolatry and disorder. It is because of sin that the human person replaced the worship of the living God with worship of creatures. Sin also manifested itself through ignorance of God and this ignorance of God was at the origin of other evils such as sexual license, injustice and murder. Sin was contempt of God. This contempt of God led to the destruction of the creature and engendered structures of injustice (LC 37-42). True liberation came through Jesus Christ. Through the death and resurrection of the Son of God, humankind was freed from the bondage of sin. Freedom and liberation from sin came through Jesus Christ in the Church, which is his body.

#### *3.3.1.2.3 The Church's mission in the process of Christian freedom and liberation*

The mission of the Church for freedom and liberation follows the steps of Jesus's mission. Jesus announced the Good News of the Kingdom to the poor and called for conversion (LC 50). Moreover, Jesus made himself poor for the poor. He gave his life on the cross in love to free humankind. From this perspective the pascal mystery is central to the understanding of Christian freedom and liberation. The Instruction states: "Through his perfect obedience on the Cross and through the glory of his Resurrection, the Lamb of God has taken away the sin of the world and opened for us the way to definitive liberation." (LC 51). Nevertheless, the heart of Christian freedom and liberation was found in justification by the grace received through faith and the sacraments (LC 52). The Church as the body of Jesus Christ administers the sacraments. However, the Church is also the people of God of the new covenant and its mission is "to respond to the anxiety of contemporary humankind as he endures oppression and yearns for freedom." (LC 61)

The CDF stressed that the mission of the Church was to help the human person in his process of liberation. Its mission was not to engage directly in the political and economic management of society. The mission, which the Church received from the Lord

was to enlighten consciences. It was within this framework that the Church worked for the integral salvation of the person. It is in this perspective that the Church also proposed a social teaching based on the teaching of Jesus. The mission of the Church is to proclaim the Good News of Christ. When the Church opts for the poor or works for the promotion of justice, it does not go beyond its mission but encourages the faithful laity to be involved directly in the political and social world (LC 61-65). The CDF stated clearly that “it is thus by pursuing her own finality that the Church sheds the light of the Gospel on earthly realities in order that human beings may be healed of their miseries and raised in dignity.” (LC 65) Faithful to its mission, the Church suggested for the liberation of the person a Social Teaching “born of the encounter of the Gospel message and of its demands summarized in the supreme commandment of love of God and neighbour in justice (106) with the problems emanating from the life of society.” (LC 72).

One of the fundamental principles defended by the Church is the dignity of the human person created in the image and likeness of God. It is within this framework that Christian freedom is defined and should be considered as an essential prerogative of the human person. In addition, the principles of solidarity and subsidiarity are intimately linked to the principle of human dignity. The principle of solidarity helps the human person to achieve the common good, while the principle of subsidiarity affirms that “neither the state nor any society must ever substitute itself for the initiative and responsibility of individuals and of intermediate communities at the level on which they can function, nor must they take away the room necessary for their freedom.” (LC 73) It is based on these principles that the Church passes judgment on socio-economic realities and denounces situations that undermine the dignity and freedom of the human person (LC 74). The Church gives priority to the human person over structures. Based on the above-mentioned principles, the Church proposed guidelines for action.

For example, the Church denounced the systematic use of violence as a necessary path to liberation. This was what justified the position taken in *Libertatis Nuntius* against the theology of liberation, which was accused of using the Marxist method. In its struggle for justice, the Church “encourages the creation and activity of associations such as trade unions, which fight for the defence of the rights and legitimate interests of the workers and for social justice, she does not thereby admit the theory that sees in the class struggle the structural dynamism of social life.” (LC 77) The Church favours the path of reform, which is contrary to the myth of revolution advocated by the theology of liberation.

To achieve true liberation the Church asks Christians to work for a civilization of love inspired by the Gospel. She also advocates the ‘Gospel of work’ based on the life of Jesus in Nazareth, where He has practiced manual labour (LC 82). The CDF gives priority to human work but a human work that respects the dignity of the person. In this perspective, the Church asked for the promotion of a culture of work that respected the people who executed it. Similarly, entrepreneurs should consider the welfare of workers before the increase of profits, and the prioritization of labour over capital (LC 87). The CDF once again demanded the promotion of the path of solidarity for the resolution of the socio-economic problems facing humankind today. It links to this latest principle, the principle of solidarity, the universal destination of goods, respect for freedom and the participation of all (LC 89-90, 95).

Furthermore, the Instruction mentioned again the canticle of the *magnificat*. It recalled that the CDF criticized Liberation theology in *Libertatis Nuntius* for making a political interpretation of this canticle. The Church, in her magisterial role, sees in the example of Mary, those who translated into words and in their lives the mystery of salvation and its liberating dimensions into social life. This can only be done through the



faith of the people of God. Thus, genuine liberation is first a liberation from sin before extending into social liberation, which is an ethical requirement (LC 97-99).

To sum up, this section on the analysis of *Libertatis Conscientia* has three parts: the first part focused on the quest for Christian freedom as a sign of the times as already mentioned in the first Instruction *Libertatis Nuntius*. The Instruction on Christian Freedom and Liberation showed that the method used by the theology of liberation based on praxis was insufficient. Thus, the CDF went further to show the complexity of the theme. In fact, human freedom has its own limit because of the tragedy of sin and its link to Truth. The third part described the mission of the Church in the process of freedom and liberation of the person. In its mission of liberation, the Church gives priority to reform over revolution. The Church suggests some principles to help the person in his process of liberation such as solidarity, subsidiarity, and participation for the common good. She encourages Christians to build a civilisation of love based on the life of Jesus of Nazareth. Nevertheless, the two Instructions have raised many questions for the theologians. Many of them have seen in *Libertatis Nuntius* a way for the Church to silence liberation theologians. The second Vatican Instruction *Libertatis Conscientia* was more positive. The next section explores the theological reactions to the two Vatican Instructions.

### **3.3.2. The Critical Theological Reactions on *Libertatis Nuntius* and *Libertatis Conscientia***

The publication of the Instruction *Libertatis Nuntius* was followed by several reactions from theologians.<sup>274</sup> One of the first feedbacks was from two theologians of liberation.

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<sup>274</sup> There is a comprehensive literature of the reactions of theologians to the two documents. In this section, many critiques are from Latin America, such as: Leonardo Boff, Clodovis Boff, and Juan Luis Segundo because of their contributions to Liberation theology. This study also refers to some theologians from western Europe in order to have a different point of view from the other continent. For instance, the analysis refers to the Italian theologian Rosino Gibellini, the Belgian theologian Gustave Thils, and the former British and Jesuit Priest, Peter Hebblethwaite. This study also refers to the significant contribution of the journalist, John L. Allen. There are other contributions such as: the analysis of the Irish theologian Denis

They are siblings, Leonardo and Clodovis Boff. These two theologians commented on Cardinal Ratzinger's exposition of some aspects of the theology of liberation in a journal entitled *Documentation Catholique* (DC)<sup>275</sup> They critically analysed in five points the CDF's Instruction *Libertatis Nuntius*. They called for all theologians of liberation to accept the remarks of the CDF. For them, liberation theologians should listen to and respect the CDF. They recalled some remarks from the Instruction that should retain the attention of liberation theologians. For example, faith must be rooted in tradition; the transcendence of faith; the danger represented by Marxism for faith and theology.<sup>276</sup>

Nevertheless, both Boffs asserted that the existence of erroneous views in some liberation theologies such as political praxis, class struggles, the historic character of faith, did not reflect the central core and major lines of Liberation theology.<sup>277</sup> For them it was difficult for some theologians trained in Western Europe to fully understand the project of Liberation theology because it is impossible to perceive the main lines of Liberation theology through the classical theological categories.<sup>278</sup>

Considering the newness of Liberation theology for the western world, they suggested a new hermeneutic based on listening and attention to what is positive in Liberation theology. According to the Boffs, the narrow view pointed out by the CDF concerning the emphasis on praxis by Liberation theology was not what was at the core of Liberation theology. They stated that in the project of Liberation theology, there was also integral liberation of the person. They completely rejected the idea that Marx was a

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Carroll on the two Instructions in his book entitled *What is Liberation Theology*. He describes how the two instructions are the consequence of objections to Liberation Theology from 1982-1983, p. 82-88; Another article of the French journalist Jullien Claude-François, remarks that in 1984, Latin America counted 46 % of catholic Christians. That was the reason for the CDF trying to control what was going on by the two Instructions. (See Jullien Claude-François, "Théologie de la libération et Realpolitik," in *Politique étrangère*, n°4 - 1984 - 49<sup>e</sup>année, 893-905.)

<sup>275</sup> Leonardo Boff and Clodovis Boff, "Cinq observations des PP. Leonardo et Clodovis Boff: Commentaire de l'exposé du cardinal Ratzinger," in *Documentation Catholique*, No 1881, (7 Octobre 1984), 909-912.

<sup>276</sup> Ibid.

<sup>277</sup> Ibid., 910.

<sup>278</sup> Ibid.

father or step-father of Liberation theology. For both theologians, the CDF did not highlight enough the spiritual experience of the poor because the poor are not simply concepts, they are human beings. Leonardo and Clodovis Boff were convinced that it is difficult but not impossible for the person who has never experienced the life of the poor to feel not only the challenges relating to the poor but also the ugly situation of their daily existence.<sup>279</sup>

In another article, Leonardo Boff situates *Libertatis Nuntius* within the Central European perspective using the term ‘European Mind-set’.<sup>280</sup> For him the Instruction does not reflect that way of thinking and the Latin American way. He denounces some charges of reductionism applied by the CDF to Liberation theology such as “denying the divinity of Christ, or the redemptive value of his death, or the Mass as actualization of the Sacrifice of the Lord and of his Eucharistic presence.”<sup>281</sup> Boff considers that liberation theologians who made use of the Marxist tradition did so for the sake of its practical usefulness to analyse the situation of the poor. They had never engaged in systematic analysis or academic reflection on the relationship between Marxism and Christianity.<sup>282</sup>

Another reaction to *Libertatis Nuntius* came from the liberation theologian Juan Luis Segundo. In a book entitled *Theology and the Church: A Response to Cardinal Ratzinger and a Warning to the Whole Church*, Segundo describes the Vatican Instruction as the conclusion of what started in Latin America because of the Puebla Conference. For him the reading of the document in the Third General Conference of Latin American Bishops at Puebla in the light of *Libertatis Nuntius* showed that “the principal elements

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<sup>279</sup> Ibid., 912.

<sup>280</sup> Leonardo Boff, “Vatican Instruction Reflects European Mind-set,” in *Liberation Theology: A documentary history*, (New York: Orbis, 1990), 417.

<sup>281</sup> Ibid.

<sup>282</sup> Ibid., 418.

for its condemnation were already present in the Puebla document.”<sup>283</sup> For Segundo, what was impossible on Latin American soil was accomplished in Rome. That was why he considered the Instruction (as other liberation theologians) as something coming “from a European who reads European phenomena and tendencies into a non-European context.”<sup>284</sup> For example he found the accusation by the CDF of the influence of Bultmann on Liberation theology unfounded because the Bultmannian methodology and agenda were born in a particular context, the context of the modern world. In addition, Segundo notes “that the magisterium, which the Supreme Pontiffs themselves have exercised most often is itself the ordinary magisterium (discourses, encyclicals, documents of pontifical commissions) and is therefore equally fallible.”<sup>285</sup> For example, he referred to the *Syllabus* of Pope Pius IX, which condemned any opinion sustaining that the Catholic religion was not the only state religion. Segundo quotes a memorandum of one of his Latin American colleagues on the Instruction as follows:

I adhere loyally and in responsible obedience to the pastoral ‘Orientations’ with which the document ends (XI)...But, out of ecclesial loyalty, I must give witness to the fact that I do not know...theologians in Latin America who support the reductive interpretations of the faith described by the document.<sup>286</sup>

Talking about the second Vatican Instruction *Libertatis Conscientia*, Rosino Gibellini affirms: “The second Instruction is positive in the sense that it brings out in a positive way the theoretical and practical aspect of the theme of Christian freedom and liberation.”<sup>287</sup> Gibellini also mentions that the second Vatican Instruction in number 70 supports the legitimacy of a theological reflection developed from a particular context and experience. Another positive point of *Libertatis Conscientia* comes from the fact that

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<sup>283</sup> Juan Luis Segundo, *Theology and the Church: A Response to Cardinal Ratzinger and a Warning to the Whole Church* (Trans. John W. Diercksmeier; London: Winston Press, 1985), 1.

<sup>284</sup> *Ibid.*, 3.

<sup>285</sup> *Ibid.*, 5.

<sup>286</sup> *Ibid.*, 13.

<sup>287</sup> Rosino Gibellini, *The Liberation Theology Debate*, (Trans. John Bowden; Brescia: Queriniana, 1986), 59.

the Instruction did not limit itself to classical talk on Christian freedom but it also extended into talk about liberation.<sup>288</sup> For Gibellini, “If the Instruction on Christian Freedom and Liberation cannot be interpreted, at least in the direct sense, as being positive about the theology of liberation, what it says proves to be positive for the theology of liberation.”<sup>289</sup>

In another article entitled *Liberation Theology and the Roman Catholic Church*, Peter Hebblethwaite sees in the second Instruction the correction of “the negative emphasis of the September 1984 Instruction.”<sup>290</sup> He underlined a different style in the second Instruction and affirmed that Pope John Paul II had been involved in the production.<sup>291</sup> Saint John Paul II had a positive view of Liberation theology, and that was why he “wrote a letter to the Brazilian bishops, which they received in Easter, 1986, with Alleluias and tears of joy. John Paul wrote that Liberation theology was not only timely, but useful and necessary.”<sup>292</sup>

The Belgian theologian Gustave Thils also underlined the positive aspect of the second Instruction. He justified it according to the understanding of liberation by the CDF. The CDF developed in the second Instruction a theology of integral liberation. Liberation began with salvific liberation from the bondage of sin and continued in the socio-political aspect of the person. That was the ethical dimension of liberation. If the first Vatican Instruction emphasised orthodoxy, the second Instruction supported a Liberation theology, which puts at the centre of its reflection an integral liberation.<sup>293</sup>

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<sup>288</sup> Ibid., 60.

<sup>289</sup> Ibid.

<sup>290</sup> Peter Hebblethwaite, “Liberation Theology and the Roman Catholic Church,” in *The Cambridge Companion to Liberation Theology*, (Ed. Christopher Rowland; United Kingdom: Cambridge University Press, 1999), 190.

<sup>291</sup> Ibid.

<sup>292</sup> Ibid., 195.

<sup>293</sup> Gustave Thils, “L’Instruction sur la liberté chrétienne et la libération (22 mars 1986),” in *Revue Théologique de Louvain*, no 17, 1986, 445.

In a book entitled *Cardinal Ratzinger: The Vatican's Enforcer of the Faith*, a reporter for the *National Catholic Reporter* named John L. Allen highlighted some events in the year 1986 in relationship to the publication of the second Instruction. Some events would have influenced the style of *Libertatis Conscientia* such as the visit of the Brazilian bishops to Rome. During this visit the Pope encouraged the bishops to continue their work for justice, but he also acknowledged the orthodoxy and the necessity of Liberation theology.<sup>294</sup> Another event was the talk of Cardinal Bernadin Gantin, head of the Congregation for Bishops at a retreat for the Brazilian' bishops on April 12, 1986. He brought a letter from Pope John Paul II supporting Liberation theology as not only opportune and useful but also necessary. It was in the middle of this atmosphere that *Libertatis Conscientia* was issued with a more positive vision.<sup>295</sup> John Allen reports the reaction of Leonardo Boff as follows: "Boff welcomed the document. He wrote Ratzinger a letter (addressed to 'Dear Brother Ratzinger'), calling the new instruction a 'decisive and historic' text that protects Liberation theology."<sup>296</sup>

In conclusion, it could be said that the Vatican Instructions *Libertatis Nuntius* and *Libertatis Conscientia* are interdependent. Even though they have different styles, the two Vatican Instructions should be read as one in the light of each other. Nevertheless, as the previous section demonstrated, the first Instruction was more negative in the sense that it pointed out some 'erroneous' aspects of Liberation theology. The second Instruction of Christian Freedom and Liberation went beyond this negative approach and focused on integral liberation. It was welcomed by Leonardo Boff, one of the fathers of Liberation theology. Was this the end of the controversy about Liberation theology?

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<sup>294</sup> John L. Allen, *Cardinal Ratzinger: The Vatican's Enforcer of the Faith*, (London: Continuum, 2000), 161.

<sup>295</sup> *Ibid.*, 162.

<sup>296</sup> *Ibid.*

A few years after these two Instructions, Jon Sobrino received a Notification from the CDF on two of his books. In the explanatory note in the Notification, the CDF mentioned the two Instructions. Quoting *Libertatis Conscientia*, the CDF recalled that the preferential option for the poor should be understood as part of the universal mission of the Church. It should never be a sign of particularism or sectarianism.<sup>297</sup> Referring to Sobrino, the CDF warned the readers about the “reductive sociological and ideological categories, which would make this preference a partisan choice and a source of conflict.”<sup>298</sup> This quotation shows clearly that the suspicious relationship between the Magisterium and Liberation theology did not end with the publication of *Libertatis Nuntius* and *Libertatis Conscientia*. So, the question here is: did the Notification to Sobrino on two of his books illustrate the continuity of the previous tumultuous relationship between the CDF and Liberation theology? The next section on the relationship between Sobrino and the Magisterium will try to answer this question.

### **3.4 THE MAGISTERIUM AND SOBRINO’S WRITINGS**

The Notification to Sobrino in 2006 provoked several criticisms from theologians all over the world. Sobrino worked for more than 50 years in El Salvador among the poor and his theology is informed and built from the life of the poor. Having identified some errors and imprecisions in his two books entitled *Jesus Christ The Liberator* and *Christ The Liberator*, the CDF decided to issue a Notification to draw the attention of Christians to some errors in certain passages of Sobrino’s previous books. How did Sobrino welcome the Notification? How did other theologians react to this Notification? This section, dedicated to the relationship between Sobrino and the Magisterium, attempts to answer

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<sup>297</sup> Congregation for the Doctrine of the Faith, “Explanatory note on the Notification on the works of Father Jon Sobrino,” available at [http://www.vatican.va/roman\\_curia/congregations/cfaith/documents/rc\\_con\\_cfaith\\_doc\\_20061126\\_notasobrino\\_en.html](http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_20061126_notasobrino_en.html) (accessed 16 February 2017)

<sup>298</sup> Ibid.

these questions. Before proceeding with this exercise, an overview of the two works, which were the subject of the Notification will be given. These works are *Jesus Christ The Liberator* and *Christ The Liberator*.

### **3.4.1 Overview of ‘Jesus Christ The Liberator’ and ‘Christ The Liberator’**

#### **3.4.1.1 ‘Jesus Christ The Liberator’**

In writing the introduction to the French translation of the Spanish version of *Jesucristo liberador: Lectura histórica-teológica de Jesús de Nazaret* (1993), Sobrino recalled the foundational motivations for his book. He cited two main foundations: European Christology that had developed around Vatican II and the Latin American Christology pioneers around Medellin. He also mentioned the influence of the Christology of Juan Luis Segundo and Leonardo Boff. He called the two main foundations, the conventional foundation of his Christology.<sup>299</sup>

To these conventional foundations, Sobrino added another foundation linked to the reality in which he lived and taught: the realities of El Salvador. These realities were characterized by the irruption of a specific image of Jesus and the irruption of the poor in theology in Latin America around the General Conference of Medellin. The poor became a sign of the times. Jesus was viewed as liberator. This specific image of Jesus and the irruption of the poor influenced Sobrino’s Christology. He also referred to the repression of the 1970<sup>s</sup> in El Salvador and the war of the 1980<sup>s</sup>.<sup>300</sup> These repressions and wars led to the death of several Christians. Many of them were innocent victims. Sobrino also calls them the crucified people.

From a methodological point of view, Sobrino wanted to make a comparison between the reality of the oppressed and the reality of the life and the destiny of Jesus

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<sup>299</sup> Jon Sobrino, *Jésus-Christ Libérateur* (Trans. Therese Benito; Paris: Cerf, 2014), 13.

<sup>300</sup> *Ibid.*, 16.



according to the Gospel narratives. Sobrino underlined three fundamental points in his book: The Kingdom of God as a gift of Jesus to the poor and the oppressed; then, Jesus' relationship to God the Father and also the Cross of Jesus.<sup>301</sup> These three constitute the three fundamental divisions of his book.

The first part of the book is divided into three chapters and describes the methodology of Latin American Christology. The first chapter analysed the new image of Jesus developed around Medellin and Puebla. Jesus was perceived as liberator. For Sobrino, this new image of Jesus as liberator overcame the alienating images of an abstract and absolute Christ. The Latin America Christology saw Christ from the salvific perspective and expressed it in terms of liberation.<sup>302</sup> It also insisted on the presence of Christ in present-day history and precisely in the oppressed.<sup>303</sup> Sobrino criticized the image of Christ suggested by some Christologies, which present Christ mainly in relation to the Father and Spirit within the Trinity. Referring to the statement concerning Christ in relation to the Father and Spirit, he states:

Nevertheless, the statement must be criticized if it leads us to ignore Jesus' constitutive historical relatedness to the Kingdom of God and the God of the Kingdom (...) I shall analyse this historical relatedness in detail later, but I want to say here that this reminder is important because of the consequences (...) when Christ the mediator is made absolute and there is no sense of his constitutive relatedness to what is mediated, the Kingdom of God."<sup>304</sup>

Referring to this quotation, the CDF will accuse Sobrino of making the distinction between Jesus and the Kingdom of God. The second chapter dealt with the ecclesial and social settings or *loci* of Christology. The ecclesial *locus* is the Church of the Poor.<sup>305</sup> The previous chapter described what the Church of the Poor was according to Sobrino. For him, the social and theological *loci* are identical. The world of the Poor is the Social-

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<sup>301</sup> Ibid., 17-18.

<sup>302</sup> Ibid., 58.

<sup>303</sup> Ibid., 61.

<sup>304</sup> Jon Sobrino, *Jesus the Liberator: A Historical-Theological Reading of Jesus of Nazareth* (trans. Paul Burns and Francis McDonagh; London: Burns & Oates, 1994), 16.

<sup>305</sup> Ibid., 28.

Theological *locus* of his Christology. In addition, the theological *locus* refers to an aspect of the sources of Revelation, which was already expressed for ever in the deposit of faith. For Sobrino, the perfect *locus* for doing Christology is “the one where the sources for the past can best be understood and where the presence of Christ and the reality of faith in him can best be grasped.”<sup>306</sup> Accordingly, the theological *locus* and the *locus* of Christology must be real. The substantial reality or *locus* in Latin American Christology were the poor of this world.<sup>307</sup>

For Sobrino, all Christology should be ecclesial because it is realized within the community. However, this real and communal faith must be brought into a relationship with the poor.<sup>308</sup> He states: “Latin American Christology (...) identifies its setting, in the sense of a real situation, as the poor of this world, and this situation is what must be present in and permeate any particular setting in which Christology is done.”<sup>309</sup> This Sobrino’s vision for the setting for his Christology diverged with the magisterium’s point of view, as was underlined in one of the points of the Notification of 2006. This study will highlight this Notification in the second part of this section.

In the third chapter, Sobrino considered the historical Jesus as the starting point of his Christology. For him, the historical Jesus was the reality of Jesus of Nazareth, his life, his mission and his destiny.<sup>310</sup> In addition, Sobrino recalled the starting point of so-called traditional Christology. The dogmatic formula of the Council of Chalcedon (451) was the starting point of traditional Catholic theology. This Council affirmed the divinity of the person of Christ in two natures. Sobrino stressed that all Christology must respect this declaration of the Council of Chalcedon. He thought that this formula was not

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<sup>306</sup> Ibid., 23.

<sup>307</sup> Ibid., 76.

<sup>308</sup> Ibid., 80.

<sup>309</sup> Sobrino, *Jesus the Liberator*, 28.

<sup>310</sup> Ibid., 90.

appropriate as a starting point for a Christology insofar as there was a pastoral difficulty linked to the understanding of terms such as person, nature, hypostasis.<sup>311</sup> There were other difficulties relating to the content of the formula of Chalcedon such as its essentialist vision, the manifestation of the divine nature of Christ as epiphany and the action of God in history. Sobrino explained the essentialist vision of the formula with the fact that it used Hellenic thought.<sup>312</sup>

In this perspective, European Christology was renewed around Vatican II. Sobrino emphasised that some European theologians such as Karl Rahner went back to Jesus of Nazareth for social and pastoral reasons. Sobrino stressed that the reasons were to emphasise Jesus's humanity.<sup>313</sup> Concerning the method, the existential hermeneutic of Bultmann was replaced by the hermeneutic of the praxis of liberation. Sobrino situated the origin of the Latin American Christology in this context. He raised awareness of the fact that Latin American Christology did not intend to repeat Bultmann's impossible mission of rediscovering the historical Jesus but to follow some post-Bulmannians whose intentions were to bring out some of the neglected aspects of the life of Jesus Christ such as the kerygma.<sup>314</sup> Latin American Christology went back to the life of Jesus of Nazareth as expressed in the Gospels: his words, his actions, his activities and praxis, his attitudes and his Spirit, his destiny on the cross and his resurrection.<sup>315</sup> It did so by avoiding the

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<sup>311</sup> Ibid., 96-97.

<sup>312</sup> Ibid., 98.

<sup>313</sup> Ibid., 104. Referring to Karl Rahner, Robert Lassalle-Klein underlines the Rahnerian roots that Sobrino's Christology and its relationship with the philosophical thinking of his fellow Jesuit Ignacio Ellacuria. He states: "Jon Sobrino's two-volume Latin American Christology builds on Ellacuria's philosophical concept of historical reality and his theology of sign. Given what I have already said about the Rahnerian roots of Ellacuria's fundamental theology, it will come as no surprise that Sobrino defines his project in relation to Rahner's 'two basic types of Christology.' Rahner distinguishes 'the saving history' type, a Christology viewed from below, which he finds in the New Testament, from what he calls 'the 'metaphysical' type", a Christology developing downwards from above, which he associates with Chalcedon and the early ecumenical councils." (Robert Lassalle-Klein, "Jesus of Gallilee and the crucified people: the contextual Christology of Jon Sobrino and Ignatcio Ellacuria," in *Theological Studies*, 70 (2009), 356. Also see Karl Rahner, "The Two Basic Types of Christology," *Theological Investigations*, vol. 13, (trans. David Bourke; New York: Seabury, 1975), 213-23.

<sup>314</sup> Ibid., 109.

<sup>315</sup> Ibid., 114.

naïve attempt to reproduce the biography of Jesus and by critically approaching the life of Jesus of Nazareth. Latin American Christology attempted to show how Jesus's life was the gospel, and vice-versa.<sup>316</sup>

In the second and third part of his book, Sobrino analysed the life of Jesus in three aspects: Jesus's relationship to the Kingdom of God; Jesus' relationship to the Father and finally His death upon the cross. The second part described the mission and faith of Jesus in three chapters (Chapter 4, 5 and 6). For Sobrino, Jesus' life in the Gospel was expressed by two main concepts: The Kingdom of God and Jesus' relationship to the Father. Even though the Kingdom and God are two distinct realities they complement each other. Describing the Kingdom of God, he states:

We must first distinguish between the mediator and the mediation of God. The Kingdom of God, formally speaking, is nothing other than the accomplishment of God's will for this world, which we call *mediation*. This mediation---(...) is associated with a person (or group) who proclaims it and initiates it: this we call the mediator. In this sense, we can and must say, according to faith, that the definitive, ultimate, and eschatological mediator of the Kingdom of God has already appeared: Jesus.<sup>317</sup>

Referring to this quotation, the CDF will accuse Sobrino of making the distinction between Jesus as Mediator and his mediation (the Kingdom of God).<sup>318</sup> Chapter four was dedicated to Jesus' relationship to the Kingdom of God. Talking about the Kingdom, Sobrino asserted that Jesus never explicitly defined the meaning of the Kingdom. Sobrino mentioned that what was clearly said about the Kingdom in the Gospels was that it was close at hand.<sup>319</sup> Nevertheless, did that mean that Jesus did not have any clear idea of what the Kingdom was? Sobrino's answer to this question was through a method divided into three ways: the first way studied the understanding of the Kingdom by Jesus by referring to what was said about the Kingdom in the Old Testament. Sobrino called it the

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<sup>316</sup> Ibid., 136.

<sup>317</sup> Sobrino, *Jesus the Liberator*, 108

<sup>318</sup> The earlier quotation is an extract from the excursus that followed the chapter four of the book of Sobrino on Jesus's relationship to the Kingdom of God.

<sup>319</sup> Ibid., 143. (Reference in the Synoptic: Mt 4: 17 and Mk 1: 15.)

‘notional way’. For example, referring to the passage in Psalm 96:13, Sobrino revealed that the Kingdom of God can be expressed in two essential ways: “(1) that God rules in his acts, (2) that it exists in order to transform a bad and unjust historical-social reality into a different good and just one.”<sup>320</sup> The second way to get the meaning of the Kingdom according to Jesus was through the recipients of the Kingdom. For instance, referring to Lk 4:18, Sobrino concluded that Jesus understood his mission as directed to the poor. Therefore, “the Kingdom belongs uniquely to the poor.”<sup>321</sup> The third way to know the meaning of the Kingdom was through daily life in the Gospel: his words and his actions. Through Jesus’s daily life in the Gospel, we perceive the presence of the Kingdom.<sup>322</sup> For example, the presence of the Kingdom can be identified in Jesus’s miracles such as the healing of the blind, the deaf, the lame or lepers (Matt 11:5; Lk 7:22).<sup>323</sup>

The fifth and the sixth chapters of Sobrino’s book are on Jesus’ relationship to the Father. In the fifth chapter Sobrino examined what Jesus thought about God and Jesus’ experience of God. Sobrino underlined how difficult the task can be in the sense that God can never be fully described in concepts. In addition, it is very difficult to penetrate Jesus’s inner psychology.<sup>324</sup> Moreover, it was not easy to get the exact concepts from the Jewish tradition in which Jesus expressed his vision of the Father. Nevertheless, Sobrino analysed the ideas of God that Jesus could have had through some of his inner attitudes such as: prayer, trust, openness and faith<sup>325</sup> Quoting Gustavo Gutierrez, Sobrino affirmed that “how Jesus contemplates God has to be deduced above all from how Jesus puts God

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<sup>320</sup> Jon Sobrino, *Jesus the Liberator: A Historical-Theological Reading of Jesus of Nazareth* (trans. Paul Burns and Francis McDonagh; London: Burns & Oates, 1994), 71. The passage of Ps. 96:13 states: “for he is coming to judge the earth. He will judge the world with righteousness, and the peoples with his truth.”

<sup>321</sup> *Ibid.*, 79.

<sup>322</sup> Sobrino, *Jésus-Christ Libérateur*, 144.

<sup>323</sup> Sobrino, *Jesus the Liberator*, 88.

<sup>324</sup> *Ibid.*, 255.

<sup>325</sup> Sobrino, *Jesus the Liberator*, 135.

into practice.”<sup>326</sup> For example, Jesus used the prophetic tradition when he defended the poor, the weak and the oppressed. So, this way of acting revealed Jesus’s vision of God.<sup>327</sup>

The sixth chapter is in continuation with the fifth. In this chapter, Sobrino stressed Jesus’s prophetic praxis. This prophetic praxis of Jesus emerged from his opposition to the anti-Kingdom.<sup>328</sup> Sobrino quoted many passages from the synoptics to illustrate his point of view. For example, concerning the direct controversies, Sobrino states:

At the beginning of his Gospel, Mark brings together five controversies (2:1-3:6), which appear in Luke (5:17-6:11) (...) The five controversies are: one, the healing and forgiving of the paralytic (2:18-22); two, eating with sinners (2:15-17); three, the question of fasting (2:18-22); four, plucking grain on the Sabbath (2:23-8); five, curing the man with a withered hand (3:1-6).<sup>329</sup>

The last part of the book focused on the Cross of Jesus. Sobrino dedicated four chapters (Chapter 7,8, 9 and 10) to this end. The seventh chapter described the historical reason for the death of Jesus, focusing his discussions on the question: why was Jesus killed? The eighth, ninth and the tenth chapters labelled subsequently the theological reason for the death of Jesus: why did Jesus die? The answer to the first question is found in Jesus’s daily life in the Gospel, and the controversies He had with his opponents. For Sobrino, there is not a clear answer to the second question because it referred to God’s mystery.<sup>330</sup> Nevertheless, Sobrino doubts about the salvific value of the death of Jesus or the significance that Jesus gave to his death. He declares:

Jesus was aware that persecution could bring him to death, but we also have to ask what he himself thought about this death, because Jesus does not look like a fanatical madman, but like a normal man who would have had to think about this. (...) Let it be said from the start that the historical Jesus did not interpret his death in terms of salvation, in terms of soteriological models later developed by the New Testament, such as expiatory sacrifice or vicarious satisfaction (...). In other words, there are no grounds for thinking

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<sup>326</sup> Ibid., 136. Also see Gustavo Gutierrez, *La Force Historique des Pauvres* (Trans. By Francis Guibal ; Paris : Cerf, 1986).

<sup>327</sup> Ibid.

<sup>328</sup> Ibid., 160-161.

<sup>329</sup> Ibid., 162.

<sup>330</sup> Ibid., 195.

that Jesus attributed an absolute transcendent meaning to his own death, as the New Testament did later.<sup>331</sup>

Sobrino also underscored the importance of this section on the cross for Latin America because it was the place where the cross was ever-present. That was why in the last chapter, Sobrino compared the crucified people or the poor to Yahweh's Suffering Servant and the Martyred people.<sup>332</sup> Sobrino's book ended with the study of the relationship between the cross of Jesus and the crucified people. In an epilogue, Sobrino remarked that even though his book ends with the cross of Jesus, the history of Jesus did not end with the cross. In fact, God raised Jesus from the dead. Therefore, "the last word on Jesus, nor is the cross of the crucified peoples (...) but I do not think that we should thereby make the liberative aspects of Jesus's life depend only on his resurrection."<sup>333</sup> For this reason, he announced that he would publish another book tracing the history of Jesus from the perspective of faith in his resurrection.<sup>334</sup> Eight years later, in 1999, Sobrino published *La fe en Jesucristo. Ensayo desde las victimas*. Some of the passages of this book were commented on by the CDF in 2006. The next section will give an overview of the book in order to set the scene for the presentation of the Notification.

#### **3.4.1.2 'Christ the Liberator'**

Sobrino's *La fe en Jesucristo. Ensayo desde las victimas* (1999), is based on two pillars: the traditions (New Testament and Church Councils) and the historical reality of the poor and the victims of oppression and wars.<sup>335</sup> It is divided into three parts: the first part, which is made up of the first seven chapters, highlighted the resurrection of Jesus. The second part, consisting of chapters eight to fourteen, dealt with the Christological titles in the New Testament. The third and final part, which constitutes the last five chapters,

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<sup>331</sup> Sobrino, *Jesus the Liberator*, 201.

<sup>332</sup> *Ibid.*, 255-264.

<sup>333</sup> *Ibid.*, 272.

<sup>334</sup> *Ibid.*

<sup>335</sup> *Ibid.*, 17.

from fifteen to nineteen, analysed conciliar Christology.<sup>336</sup> For Sobrino, the difference between the previous book on *Jesus Christ the Liberator* and this one is clear. While the former was on the knowledge of Jesus, the latter was on faith in Christ.<sup>337</sup>

In the first chapter, Sobrino described the concern that shapes his reflection on the resurrection of Jesus. This concern is “being able to live as risen people---in the weakness of history---in following Jesus and to have the victims’ hope that God will triumph over injustice.”<sup>338</sup> Then Sobrino analysed the resurrection from three perspectives.

Firstly, he studied the resurrection of Jesus from the hermeneutical point of view. He called it ‘the hermeneutical problem provided by the resurrection’ (Chapter 2 and 3).<sup>339</sup> The resurrection took place in the past and in a different cultural setting. Moreover, the resurrection is described as an irruption of an eschatological event in the life of the disciples. For Sobrino, “it is not clear that an eschatological event can be understood, and therefore one has to try to establish under what conditions it might be so that, in simple words, we know what we are talking about.”<sup>340</sup>

Secondly, Sobrino studied the resurrection of Jesus from the historical perspective. He tried to describe what happened. He called it ‘the historical problem’ (Chapter 4 and 5). In these chapters, Sobrino made some observations concerning the evidence of the changes brought about in the disciples and what these meant for them. He questioned the meaning of the resurrection for believers today.<sup>341</sup> Thirdly, Sobrino dealt with the resurrection of Jesus from the theological perspective. He called it the

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<sup>336</sup> Jon Sobrino, *La foi en Jésus-Christ : Essai à partir des victimes* (Trans. Thérèse Benito; Paris: Cerf, 2015), 15.

<sup>337</sup> *Ibid.*

<sup>338</sup> Jon Sobrino, *Christ the Liberator: A view from the victims* (Trans’. Paul Burns; Maryknoll, NY:Orbis, 2001), 15.

<sup>339</sup> *Ibid.*

<sup>340</sup> *Ibid.*

<sup>341</sup> *Ibid.*, 16.



‘theological problem’ (Chapter 6 and 7). In these chapters, Sobrino answered the question: “What Jesus’ resurrection has to say about God, about Jesus, and about human beings?”<sup>342</sup>

In the second part of his book covering chapters eight to fourteen, Sobrino described the Christological titles in the New Testament and showed how those titles were interpreted in Latin America. He notes that this was one of the ways to analyse the diversity of Christologies. In chapter eight, he underlined some difficulties involved in an effort to analyse some Christologies by describing the titles attributed to Jesus in the New Testament. He states:

The difficulties of this way of proceeding are plain, since the titles can have different meanings in different times and places (...) In this sense it is impossible to ‘systematize the Christology of the New Testament from titles, which does not remove their great importance, since they are concise answers to the basic and lasting question in Christological faith---who is Jesus?’<sup>343</sup>

Referring to Jesus’s relationship to the Father, Sobrino proposed that the titles attributed to Jesus in the New Testament did not mean a priori that Jesus was God. If many formulas in the New Testament such as High Priest, Messiah, Son of God were used as Christological titles for Jesus, it meant “that at the outset Jesus was not spoken of as God, nor was divinity a term applied to him; this happened only after a considerable interval of believing explication, almost certainly after the fall of Jerusalem.”<sup>344</sup> The CDF will refer to this extract in the Notification to assert that Sobrino diminished the extensiveness of the New Testament passages about the understanding of Jesus as God. The Notification will be studied in the next section.

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<sup>342</sup> Ibid.

<sup>343</sup> Ibid., 117.

<sup>344</sup> Ibid., 114.

Sobrino examined five titles of Jesus Christ in the New Testament (Chapter 9-13) such as: “High Priest, Messiah, Lord, Son of God and Word.”<sup>345</sup> The Last Chapter of the second part of his book is on Jesus as Good News ‘Eu-Aggelion.’ Explaining the title of the High Priest, Sobrino emphasised the true humanity of Christ. He stated that it referred to Jesus’s earthly work. Talking about the mediation of Christ as High Priest, Sobrino declared that “Christ does not derive his possibility of being mediator from anything added to humanity; it belongs to him by his practice of being human.”<sup>346</sup> The CDF will notify Sobrino on this passage reproaching him for not sufficiently explaining the relation between mediator and mediation.

The last part of the book (chapter 15-19), examined conciliar Christology. Sobrino analysed some Christological statements of the early councils. Some passages concerning Sobrino’s understanding of the conciliar texts were criticised by the CDF. For example, in Chapter 15, Sobrino highlighted that the conciliar texts were limited and dangerous. He asserts: “Let me also say at the outset that while these texts are useful theologically, besides being normative, they are also limited and even dangerous, as is widely recognized today.”<sup>347</sup> In the Notification to Sobrino in 2006, the CDF denounced Sobrino’s comments on conciliar texts as will be discussed in the next section of this research. Sobrino also mentioned that Patristic Christology has a grandiose vision of Christ. For example, talking about Irenaeus’s theology of Incarnation, Sobrino claimed that Irenaeus’s theology found its place and relevance during the time of the apostles. However, if patristic theology was viewed from the perspective of the victims, Sobrino concluded that it needed to reshape the patristic concept of salvation. This meant reformulating salvation as liberation.<sup>348</sup> In addition, Sobrino highlighted the fact that in

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<sup>345</sup> Ibid.

<sup>346</sup> Ibid., 135.

<sup>347</sup> Ibid., 221.

<sup>348</sup> Ibid., 236.

the patristic period, the Kingdom of God made no appearance in Christological formulations. Sobrino mentioned the importance of the Kingdom of God for the understanding of the nature of God. The Kingdom of God was neglected in the Patristic texts. For Sobrino, “this serious danger, without anachronisms, should be taken into account when reading patristic texts.”<sup>349</sup>

In Chapter 16 to 19, Sobrino examined the conciliar texts chronologically. He started with the divinity of Christ proclaimed at the council of Nicea in 325. Sobrino’s comments on the understanding of the Logos in John’s prologue will be a subject of controversy in the Notification from the CDF. For example, when talking about the Logos, Sobrino states:

In the Hellenic world, the logos of John’s prologue acquired great missionary importance for preaching Christ, just as messiah had one in the Jewish world (...) Strictly speaking, this *logos* is not yet said to be God (consubstantial with the Father), but something is claimed for him that will have great importance for reaching this conclusion: his pre-existence. This does not signify something purely temporal but relates him to the creation and links the logos with action specific to the divinity.<sup>350</sup>

Referring to this extract, the CDF accused Sobrino of diminishing the extensiveness of the New Testament passages. In the Epilogue of *Christ The Liberator*, Sobrino recapped the main point of his two books: *Jesus Christ the Liberator* and *Christ the Liberator*. The first point was the originality of the Christian God. Sobrino stated that: “Chalcedon can teach us something important about God but that this important something is usually left out of account.”<sup>351</sup> Sobrino notes that Nicea (325) raised the question about the personal unity of Jesus Christ and this was discussed explicitly at Ephesus (431). This council pronounced that there are two natures of Christ and asserted that Mary was the mother of God. Chalcedon (451) declared that the two natures of Christ

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<sup>349</sup> Ibid., 238.

<sup>350</sup> Ibid., 257.

<sup>351</sup> Ibid., 332.

were not mixed. Sobrino concluded that if the two natures of Jesus were not mixed, it meant that Jesus was properly and fully human. Therefore, his divinity was beyond our perception and we can only infer it.<sup>352</sup> For Sobrino, the fact that God is manifest in Jesus should be remembered to avoid the greatest temptation of the faith: “a theism without Jesus, which can come to be a theism against Jesus.”<sup>353</sup>

The second point to be remembered is the centrality of the Kingdom of God. What we learnt from Chalcedon was that “we meet God essentially in Jesus.”<sup>354</sup> For Sobrino, Jesus’s relationship with the Kingdom of God gradually disappeared from Christological thought by identifying Jesus with the Kingdom. According to Sobrino, Jesus cannot be identified with the Kingdom. He states:

I am obviously not denying that Jesus’s person embodied Kingdom values, but, however trivial the point may appear, the reality of the Kingdom preached by Jesus (with its roots in the Old Testament) was not conceived as a person (even a collective person) but as a transformed social reality.<sup>355</sup>

Another critique from Sobrino concerned the ‘ecclesialization’ of the Kingdom of God. Sobrino notes that under the regime of Christendom, the church came to be equated with the Kingdom of God.<sup>356</sup> This last point focused on the devaluation of the Kingdom as an a-historical reality and esoteric interiority. The consequences were “that the relationship between the Kingdom of God and the liberation of the poor is removed from the course of history.”<sup>357</sup>

The third point to be remembered was that the disappearance of the Kingdom of God led to the disappearance of the centrality given to the poor in Christian identity. The poor were forgotten not only from the anthropological and social perspective but also

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<sup>352</sup> *Ibid.*, 333.

<sup>353</sup> *Ibid.*

<sup>354</sup> *Ibid.*, 334.

<sup>355</sup> *Ibid.*, 335.

<sup>356</sup> *Ibid.*

<sup>357</sup> *Ibid.*

from the theological and ecclesial one. Talking about the Kingdom and the poor, Sobrino states:

In my view the main problem in accepting the central place of the Kingdom lies in the fact that doing so not only leads back to Jesus of Nazareth but also gives a primary and preferential place to the poor of this world. And these poor have definite characteristics: they are in the majority (which makes other groups the exceptions); (...) They call the church into question, as nothing else does, which means that they have always been taken some account of by the church, but they have not been its central concern.<sup>358</sup>

### 3.4.2 A Brief presentation of the Notification

In November 2006, the Congregation for the Doctrine of the Faith (CDF) sent a Notification to Jon Sobrino on two of his books entitled: *Jesucristo liberador: Lectura histórica-teológica de Jesús de Nazaret* and *La fe en Jesucristo. Ensayo desde las víctimas*. In the Introduction to the Notification, the CDF mentioned how it found some errors and imprecisions in these two books and decided to offer to the faithful solid criteria to read those books based on the doctrine of the Church.<sup>359</sup>

The Notification had eleven numbers and six main points on which the CDF notes the so-called errors or dangerous propositions. The first point of the Notification is the introduction and it gives the reasons for the publication of the Notification as mentioned previously. The second and the third points concern the methodological presuppositions on which Jon Sobrino based his theological reflection and specifically his Christology. The controversy came from the fact that Sobrino considered “The Church of the poor” as the setting of his theological reflection. Moreover, Sobrino was accused of considering some texts from the major Councils as limited and dangerous.<sup>360</sup>

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<sup>358</sup> Ibid., 336.

<sup>359</sup> Congregation for the Doctrine of the Faith, “Notification on the works of Father Jon Sobrino: *Jesucristo liberador: Lectura histórico-teológica de Jesús de Nazaret* and *La fe en Jesucristo. Ensayo desde las víctimas*,” available at [http://www.vatican.va/roman\\_curia/congregations/cfaith/documents/rc\\_con\\_cfaith\\_doc\\_20061126\\_Notification-sobrino\\_en.html](http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_20061126_Notification-sobrino_en.html) (accessed 27 October 2016).

<sup>360</sup> Ibid.

The fourth point of the Notification considered the divinity of Jesus Christ. Sobrino was accused of not being sufficiently precise on his assertion affirming Jesus as God based on the interpretation of John 20: 28, “Thomas replied, ‘My Lord and my God!’”. According to the CDF, Sobrino did not deny the divinity of Christ but he did not point out such divinity sufficiently. Concerning the major councils of the early Church, the CDF accused him of calling their formulas dangerous, ambiguous and negative. The fifth and the sixth points of the Notification focused on the Incarnation of the Son of God. The CDF criticized Sobrino for failing to give a detailed explanation of the relationship between the Son and Jesus. As Sobrino distinguished the two, the CDF saw the danger that readers of Sobrino’s book might see two different subjects in Jesus. The Notification pointed out the consequences of Sobrino’s separation of Jesus and the Son based on the understanding of the two natures of Jesus affirmed by the Council of Chalcedon. The CDF concluded that the unity of the person of Jesus is not clear in some of the passages of Sobrino’s book entitled *Christ the Liberator*.

The seventh point of the Notification highlighted the distinction made by Sobrino between Jesus Christ and the Kingdom of God. The CDF reproached Sobrino for not having sufficiently explained the link between Jesus the Mediator and the Kingdom of God, which He mediated. For the CDF, “Jesus Christ and the Kingdom are identified: in the person of Jesus the Kingdom has already been made present.”<sup>361</sup> The eighth point featured the self-consciousness of Jesus. Sobrino is accused of failing to explain clearly the unique singularity that exists between Jesus and the Father. For example, when Sobrino spoke of Jesus as a believer, the CDF raised the question of whether Jesus was a believer like us?

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<sup>361</sup> Ibid.

The ninth and tenth points concerned the salvific value of Jesus' death. The CDF believed that in some passages Sobrino did not state clearly the salvific value of Jesus' death. The CDF concluded that Sobrino did not make sufficient reference to the Bible. In the conclusion, which is the eleventh point, the CDF praised a theology that arose from the impulse of truth. The CDF stated clearly that theological reflection cannot have any other foundation than the faith of the Church in communion with the magisterium.

To recapitulate, the eleven points made in the Notification to Sobrino asserted that some passages of his two books were not clear. Two key issues were raised by the CDF: The methodological and doctrinal approaches of some extracts of Sobrino's books. From the methodological aspect, the CDF proposed that every theology should take as its foundation the faith of the Church. Concerning the doctrinal aspect, the CDF invited Sobrino to clarify the relationship between Jesus and Son, Jesus and the Kingdom, and especially the importance of the major early Councils of the Church such as Ephesus and Chalcedon. The six major concerns mentioned by the CDF about the two books of Sobrino (the methodological presuppositions; The divinity of Jesus Christ; the Incarnation of the Son of God; the relationship between Jesus and the Kingdom of God; The Self-consciousness of Jesus; and the Salvific Value of the Death of Jesus) will be interpreted in various ways not only by Sobrino himself but also by some liberation theologians. However, the first question here is: How did Sobrino react to the Notification?

### **3.4.3 Sobrino and the Magisterium: Controversial Relationship?**

On December 13th, 2006, Jon Sobrino sent his response concerning the Notification to the CDF through his General Superior, Father Kolvenbach.<sup>362</sup> In this letter, Sobrino

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<sup>362</sup> The electronic version of this letter is found online at <http://www.alterinfos.org/spip.php?article1050> (Accessed 15/10/2018). The French copy found on that website will be used in this section.

justified why he could not adhere unreservedly to the criticisms of the CDF on his two-works mentioned in the Notification.<sup>363</sup> To justify this, he constructed some arguments,

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<sup>363</sup> Sobrino's case is not the only one in the history of contemporary theology in recent years. One of the well-known moral theologian Charles E. Curran was suspended from teaching Catholic Theology in 1986. There are comprehensive articles on his case in *Reading Moral Theology* No. 6; ed. Charles E. Curran and Richard A. McCormick (New York: Paulist Press, 1988), 357-540); Here is a review of some catholic authors and theologians who were notified on their work ten years before and after Sobrino.

In 1997, Father Tissa Balasuriya, a theologian from Sri Lanka and a member of the Oblates of Mary Immaculate, was notified on his book entitled *Mary and Human Liberation* by the CDF. The CDF, supported by the Bishops' Conference of Sri Lanka declared that Father Balasuriya's book "contained statements incompatible with the faith of the Church regarding the doctrine of revelation and its transmission, Christology, soteriology and Mariology."

([http://www.vatican.va/roman\\_curia/congregations/cfaith/documents/rc\\_con\\_cfaith\\_doc\\_19970102\\_tissa-balasuriya\\_en.html](http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_19970102_tissa-balasuriya_en.html)) (accessed 19/05/2017)

One year later in 1998, another Jesuit Priest, Father Anthony de Mello (1931-1998) was notified. The CDF appreciated some valid element of the oriental wisdom in his writings. The CDF stated that his writings "can be helpful in achieving self-mastery, in breaking the bonds and feelings that keep us from being free, and in approaching with serenity the various vicissitudes of life." But the CDF opposed "a progressive distancing from the essential contents of the Christian faith."

[http://www.vatican.va/roman\\_curia/congregations/cfaith/documents/rc\\_con\\_cfaith\\_doc\\_19980624\\_demello\\_en.html](http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_19980624_demello_en.html) (accessed 19/05/2017)

In 1999, the CDF notified also Sister Jeannine Gramick, SSND, and Father Robert Nugent, SDS. These two were engaged in ministry for homosexuals in Washington where they founded the organisation called the New Way of Life. The CDF notified them on some of their writings: *Building Bridges: Gay and Lesbian Reality and the Catholic Church* (Mystic: Twenty-Third Publications, 1992), and *Voices of Hope: A Collection of Positive Catholic Writings on Gay and Lesbian Issues* (New York: Centre for Homophobia Education, 1995).

[http://www.vatican.va/roman\\_curia/congregations/cfaith/documents/rc\\_con\\_cfaith\\_doc\\_19990531\\_gramick-nugent-notification\\_en.html](http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_19990531_gramick-nugent-notification_en.html) (accessed 19/05/2017)

In 2000, the CDF also notified some works of Professor Dr. Reinhard Messner from Austria on the fundamental aspects of the faith and of the sacramental life of the Church.

[http://www.vatican.va/roman\\_curia/congregations/cfaith/documents/rc\\_con\\_cfaith\\_doc\\_20001130\\_messner\\_en.html](http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_20001130_messner_en.html) (accessed 19/05/2017)

In 2001, the Jesuit theologian Jacques Dupuis was notified on his book entitled *Toward a Christian Theology of Religious Pluralism* (Orbis Books: Maryknoll, NY, 1997). For the CDF, Dupuis's book is "an introductory reflection on a Christian theology of religious pluralism. It is not simply a theology of religions, but a theology of religious pluralism, which seeks to investigate, in the light of Christian faith, the significance of the plurality of religious traditions in God's plan for humanity. Aware of the potential problems in this approach, the author does not conceal the possibility that his hypothesis may raise as many questions as it seeks to answer."

[http://www.vatican.va/roman\\_curia/congregations/cfaith/documents/rc\\_con\\_cfaith\\_doc\\_20010124\\_dupuis\\_en.html](http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_20010124_dupuis_en.html) (accessed 19/05/2017).

Also in 2001, Father Marciano Vidal, a member of the Congregation of the Most Holy Redeemer was notified on some of his writings. The CDF concluded that "An initial study of certain works by Father Marciano Vidal, C.Ss.R., namely, *Diccionario de Ética Teológica*, *La Propuesta moral de Juan Pablo II: Comentario Teológico-Moral de la Encíclica "Veritatis Splendor"* and the volumes of *Moral de Actitudes* (in both the Spanish original and the most recent Italian edition), revealed errors and ambiguities."

[http://www.vatican.va/roman\\_curia/congregations/cfaith/documents/rc\\_con\\_cfaith\\_doc\\_20010515\\_vidal\\_en.html](http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_20010515_vidal_en.html) (accessed 19/05/2017).

In 2004, the Jesuit Priest, Father Roger Haight was notified on his book *Jesus Symbol of God*. In the introduction of the notification to him, the CDF declared the following: "The Congregation for the Doctrine of the Faith, after careful study, has judged that the book *Jesus Symbol of God* (Maryknoll, NY: Orbis Books, 1999), by Father Roger Haight S.J., contains serious doctrinal errors regarding certain fundamental truths of faith. It was therefore decided to publish this Notification in its regard, which concludes the relevant procedure for doctrinal examination."



which he called the fundamental reason. The fundamental reason is that nobody had ever found that his works are incompatible with the faith of the Church. For Sobrino, many theologians have read his two books before the Notification and many of them have even read the Notification, but their conclusion is that there is nothing incompatible with the faith of the Catholic Church.<sup>364</sup>

Sobrino found it absurd that in the fifteen years prior to the Notification, the book entitled *Jesucristo Liberador, Lectura histórico-teológica de Jesu de Nazaret* (1991) was published and translated into many languages such as Portuguese, English, German and Italian, neither the reviews nor the theological comments expressed such criticisms raised by the CDF. Concerning the second book entitled *La fe en Jesucristo, Ensayo desde las victimas* (1999) published seven years before the Notification, and translated into Portuguese, English and Italian, Sobrino notes that it was examined carefully before its publication by many theologians in various disciplines. A year before the Notification of the CDF, the theologian Bernard Sesboüé was asked to read this second book and he found only what he called a technical error and not the doctrinal one. Based on these

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In 2012, Sister Margaret A. Farley, member of the Sisters of Mercy of the Americas was notified on her book entitled *Just Love. A Framework for Christian Sexual Ethics* (New York: Continuum, 2006). For the CDF, her book has been a cause of confusion among the faithful and for this reason they decided to examine the book. After examination, the CDF declared that the book “contained erroneous propositions, the dissemination of which risks grave harm to the faithful.”

[http://www.vatican.va/roman\\_curia/congregations/cfaith/documents/rc\\_con\\_cfaith\\_doc\\_20120330\\_notafarley\\_en.html](http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_20120330_notafarley_en.html) (accessed 19/05/2017).

Another recent development in theology refers to the work of the American theologian Elisabeth Johnson whose book entitled *Quest for the Living God: Mapping Frontiers in the Theology of God* was investigated in 2011 by the Bishops' Conference of the United States of America. In the book *When the Magisterium Intervenes* Richard R. Gaillardetz put together comprehensive articles on Elisabeth Johnson's case (Richard R. Gaillardetz ed., *When the Magisterium Intervenes: The Magisterium and Theologians in Today's Church*, (Collegville: Liturgical Press, 2011), 177-276) For the Bishops' Conference of the US, as far as Johnson's book is “directed primarily to an audience of non-specialist readers and is being used as a textbook for study of the doctrine of God, the Committee for Doctrine finds itself obligated to state publicly that the doctrine of God presented in *Quest for Living God* does not accord with authentic Catholic teaching on essential points.” (Richard R. Gaillardetz ed., *When the Magisterium Intervenes*, 199.)

<sup>364</sup> “El Salvador : Lettre du P. Jon Sobrino au Père général des Jésuites” <http://www.alterinfos.org/spip.php?article1050> (accessed 05 October 2016)

arguments, Sobrino persisted in his position that he could not accept the remarks of the Notification.

Sobrino also recalls 30 years of a controversial relationship with the Magisterium. For him, the Notification of the CDF was not a surprise because he is used to it. His tumultuous relationship with the Magisterium started in 1975 when he replied to the Congregation for Catholic Education. Sobrino did not mention why he had to do so. In 1976, he replied to the CDF under Cardinal Seper and many times under Cardinal Ratzinger. Sobrino showed how he received the support from his superiors and encouragement to always answer with honesty and kindness to the CDF.

But Sobrino suffered the unevangelical character of the methods used by the CDF against theologians as this emerges from the report given by his superior. Sobrino notes that in the past 30 years, there had developed a hostile atmosphere in the Vatican against his theology and especially Liberation theology. For this reason, he considered it would be unethical and unevangelical to subscribe to the Notification. He gave some examples supporting what he called the poisonous atmosphere created in the Vatican against his theology. He highlighted the example of Bishop Romero, arguing that the influence of his theology on Romero's writings and homilies caused problems in the Vatican concerning his canonisation.<sup>365</sup>

Another reason for Sobrino not to subscribe to the Notification was motivated by the methods used by the Vatican over the last 20 and 30 years. For him, the Vatican had been hunting not only theologians but also bishops without mercy. He cited some of them such as Romero, Don Helder Camara, Don Samuel Ruiz and thousands of religious scholars.<sup>366</sup> For him, to adhere to the Notification after what it said previously would have

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<sup>365</sup> Ibid.

<sup>366</sup> The worries about the Vatican's method in dealing with the theologians has been reported by The National Catholic Reporter recently. The journal analyses the letter of prominent theologians, priests and bishops who wrote to the Vatican asking for the reform of Vatican doctrinal investigations. The journal

been to support an unjust method. Sobrino concluded his letter to the CDF by showing how happy he is to live far away from such a place.<sup>367</sup>

To sum up, Sobrino evoked two main reasons for not adhering to the Notification. The first reason was that for the past 15 years his two books had not only been translated into many languages but also had been reviewed by many theologians. None of them identified dangerous propositions as suggested by the CDF. Secondly, Sobrino brought up his last 30 years of a contentious relationship with the Magisterium. He felt that a poisonous atmosphere had been created in the Vatican over the previous 30 years against his theology. Given this defensive position from Sobrino, the next question is: How did other theologians react to the Notification?<sup>368</sup>

### **3.4.4 Theological Reactions to the Notification**

One of the reactions to the Notification came from the Study Centre of the Society of Jesus of Catalunya in Spain. In the collection entitled *Cristianisme I Justicia*, it suggests seven points regarding the Notification. According to this collection, there are no

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mentions some high-profile names such as Fr. Roy Bourgeois, Sr. Jeannine Gramick, Sr. Elizabeth Johnson, the Australian Bishop William Morris, the Irish Redemptorist Fr. Tony Flannery and Australian former priest Paul Collins. In their letter they suggest “new guiding principles for the doctrinal office and a new possible procedure for investigations, moving final responsibility for the matter to the Vatican's office for the Synod of Bishops.” (See Joshua J. McElwee, “In letter to CDF, theologians and bishops call for reform of Vatican doctrinal investigations,” available at <https://www.ncronline.org/news/vatican/letter-cdf-group-calls-reform-vatican-investigations> (accessed 25/05/2017)

<sup>367</sup> Ibid.

<sup>368</sup> For the answer to this question, this study will highlight some theologians among a comprehensive list of theologians from around the world who reacted to the Notification to Sobrino. I opted to analyse the reaction of many theologians mostly Jesuits, as Sobrino is Jesuit. The study refers to the analysis of the Jesuits from the Study Centre of the Society of Jesus in Catalunya, Spain; the Irish theologian Gerry O’Hanlon, the French theologian Bernard Sesboué and from the North of America, James T Bretzke who is also Jesuit. This research also analyses two theologians from the Ecumenical Association of Third World Theologians: Tissa Balassuriya from Sri Lanka and Jose Comblin from Brazil. Father Tissa Balassuriya is a member of the Order of Mary Immaculate and he also received a Notification from the CDF in 1997 on his book entitled *Mary and Human Liberation*. This study also chose Jose Comblin, one of the founding fathers of Liberation theology. There is also a list of comprehensive theologians who reacted to the Notification in a book entitled *Getting the Poor Down from the Cross: Christology of Liberation*. Many articles are found such as: “An Analysis of the ‘Notificatio’ from a Biblical Point of View” by Eduardo De La Serna from Argentina; “A Global Vision of Jesus Christ in the Notification about Sobrino” by Eduardo Frades from Venezuela; “Jon Sobrino’s Notification” by Ronaldo Muñoz from Chile; “The Church of Notifications” by Jean Richard from Laval in Canada; “In Between the lines of the Notification” by Afonso Mari Ligorio Soares from Brazil; “What is behind the Notification of Jon Sobrino?” by Jung Mo Sung from Brazil; and “Considerations about the Notification” by Pedro Trigo from Venezuela.

discrepancies in Sobrino's Christology regarding the faith of the Church. If there is one, it should be found in "a particular given theology, which does not exhaust the expression of that faith."<sup>369</sup> For the Jesuit Centre, the CDF did not treat Sobrino's Christology with sufficient impartiality and there was a lack of prior sympathy towards him.

In the second point of the Notification, the CDF affirmed that the ecclesial foundation of Christology cannot be 'the Church of the poor' but rather the apostolic faith. It recalled that the theologian must always remember that 'theology is the science of the faith'.<sup>370</sup> From this statement, the Jesuit Study Centre concluded that if theology were the science of faith, it also meant that the CDF did not have the theological skill to assess Sobrino's Christology from a universal point of view. The Jesuit Study Centre states: "If, as the CDF says, theology is the 'science of the faith', then it may be affirmed that the Notification is also lacking in the theological competence necessary for passing judgement from science's universal perspective rather than from a particular vision..."<sup>371</sup>

The Jesuits of Catalunya perceive in the CDF's Notification to Sobrino not only a coldness and carelessness but also a lack of sensitivity in replying "to the religious concerns of believers and non-believers who live immersed in the dominant culture."<sup>372</sup> Based on the *Spiritual Exercises* of Saint Ignatius, they recalled that their founder asked them to resist the incorrect actions of ecclesiastical superiors. Why must they do that? They answer:

For the Church's good and for its credibility, and above all for the defence of the faith in the Lord Jesus Christ, it is most desirable that those who exercise in Church the service of truth be outstanding for that capacity for 'comprehension' without which there can be no hope of being assisted by God's Spirit."<sup>373</sup>

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<sup>369</sup> Cristianisme I Justícia, *Commentary on the 'Notification' regarding Jon Sobrino*, no 126, September 2007, 41.

<sup>370</sup> *Ibid.*, no 2.

<sup>371</sup> Cristianisme I Justícia, *Commentary on the 'Notification' regarding Jon Sobrino*, no 2.

<sup>372</sup> *Ibid.*, no 3.

<sup>373</sup> *Ibid.*, no 5.

Analysing the Notification, the Irish Jesuit Gerry O’Hanlon cogently observed that the Magisterium can be perceived on the one hand as a gift from God that we should respect and treasure. On the other hand, even if the Magisterium is assisted by the Holy Spirit, “the Magisterium is not God, and neither is all of what it says of equal authority or central to the Gospel of Jesus Christ.”<sup>374</sup> For him, history had shown that the Magisterium could be wrong. He states:

we know of egregious errors from past Church teaching- the teaching which defended slavery, the permission given in a papal Bull by Innocent IV for the torturing of people in order to get them to admit to heresy, Leo X’s defence of the burning of heretics at the stake and so on. We know of theologians and saints in the past and present who have been subject to Church suspicion and even condemnation and then rehabilitated – one thinks of Aquinas himself, Ignatius of Loyola, and such twentieth century luminaries as Rahner, de Lubac, Chenu, Congar and even Von Balthasar.<sup>375</sup>

Based on the above quotation, Gerry O’Hanlon concluded that there is a need for the Church authority to exercise its teaching authority with care and maturity. Moreover, he underlined that “there has been a great concern about the manner in which the

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<sup>374</sup> Gerry O’Hanlon, “Jon Sobrino: The Notification,” in *The Furrow*, Vol. 58, No 5 (2007), 281. The analysis of O’Hanlon also brings to light the relationship between the Magisterium and theologians in the history of contemporary theology. Concerning the relationship between The Ecclesiastical Magisterium and Theology, there is an article from the International Theological Commission from 1975 which described the role of the Magisterium and Theologians in twelve theses. In fact, Magisterium and Theologians are bound by certain obligations such as: the word of God; the ‘sensus fidei’; ‘the documents of the tradition’ (Thesis 3-4). There are also some differences as the Magisterium’s role is to defend the integrity and unity of faith and morals when Theologians must serve as mediators between the Magisterium and the people of God (Thesis 5). (Otto Semmelroth and Karl Lehmann, “The Ecclesiastical Magisterium and Theology” in *Reading Moral Theology No. 3*; ed. Charles E. Curran and Richard A. McCormick (New York: Paulist Press, 1982), 151-170.); This book also contains some articles on the relationship between the Magisterium and theologians such as: Robert Coffy, “The Magisterium and Theology,” *Ibid.*, 206-222, where Coffy refers precisely to the relationship between theologians and bishops; Also the article of John R. Quinn, “The Magisterium and the Field of Theology,” *Ibid.*, 271-296, summarizes again the twelve thesis about the relationship between Magisterium and Theologians. In another article “The Magisterium vs. the Theologians: Debunking Some Fictions,” Raymond E. Brown ‘demythologizes’ the dispute between the Magisterium and theologians. For him, the dispute between them has been greatly exaggerated and surrounded with fictions, *Ibid.*, 282. Karl Rahner in another article invites the Magisterium and theologians to a dialogue which means concessions from both sides. For him, “each side must be willing to grant, in theology and practice, to the other.” (Karl Rahner, “Theology and Magisterium: Self-Appraisals” in *Reading Moral Theology No. 6*; ed. Charles E. Curran and Richard A. McCormick (New York: Paulist Press, 1982), 35; For Roger Mahony, the dissenting opinion of theologians does not reduce the authentic teaching of the Church because it is just another opinion. In addition, theologians are more than apologists but they also have a critical and creative role in the new development of doctrine. (Roger Mahony, “The Magisterium and Theological Dissent”, 172-173.)

<sup>375</sup> *Ibid.*, 282.

investigations of theologians are conducted”.<sup>376</sup> He mentioned that Roman authorities’ procedures need to be fair, transparent and just. They should also give the opportunity to those condemned to appeal at both local and also at Vatican level.<sup>377</sup> He referred to Juan Alfaro and Bernard Sesboüé as orthodox theologians who defended the views of Sobrino. O’Hanlon supports that the method used by the CDF is suspicious in the sense that he can also find many heresies in the encyclicals of John Paul II.<sup>378</sup>

In an article entitled *The Christology of Jon Sobrino*, the theologian Bernard Sesboüé expounded his point of view on the issues raised by the CDF in the two books of Sobrino. He began by outlining the context of the two books cited by the CDF and their view of some points of these books as erroneous. For him, the two books presented the new Christology of Sobrino. In his analysis, Sesboüé also acknowledged that “Sobrino’s perspective is partial and, to a certain extent, biased because it takes the perspective of the countless victims of human history and their God.”<sup>379</sup> Moreover, he finds it hard to believe that Sobrino’s Christology could be suspected of ideology.<sup>380</sup> However, Sobrino’s Christology does have some limitations. Sesboüé starts with a positive critique combined with the negative ones. In the following quotation, he expresses at the same time the positive aspects and the limitations of Sobrino’s Christology:

The Christology is completely orthodox with respect to the divinity, humanity, and unity of Christ’s person. Suspicion expressed about some earlier liberation theologians cannot be levelled against a theologian who has taken great care to use language more doctrinally precise than that in earlier publications. (However, we have noted a technical error in Sobrino’s understanding of the communication of idioms.)<sup>381</sup>

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<sup>376</sup> Ibid.

<sup>377</sup> Ibid., 283.

<sup>378</sup> Ibid., 284.

<sup>379</sup> Bernard Sesboüé, “The Christology of Jon Sobrino” in *Theology Digest*, Vol, 54, No 2 (2010), 165.

<sup>380</sup> Ibid., 166.

<sup>381</sup> Ibid., 173.

This quotation challenged the Notification of the CDF to Sobrino in which they believed to have found a list of erroneous and dangerous propositions in his books. For Sesboué, Sobrino respected not only the normative status of the early councils but he also understood their true meaning. Nevertheless, Sobrino brings out the gaps between the time that the conciliar definitions were formulated and the living situation of his time. This is the reason for proposing a Christology from the perspective of the victims.<sup>382</sup> Sesboué states: “What Sobrino critiques in some conciliar texts is not what they say, but what they do not say and the fact that the texts therefore ‘short-circuit’ the first moment of preference and partiality. Proclamation of the gospel must have due concern for the poor and for the victims.”<sup>383</sup>

Following the Notification to Jon Sobrino, many theological reactions came also from the so-called Third World. The Ecumenical Association of Third World Theologians published a document entitled *Getting the Poor Down from the Cross: Christology of Liberation*. This collection gathered several articles on the Notification to Sobrino. In many reflections those theologians from the Third World raised some questions not only about the Notification itself but also about the controversial historical development of Catholic doctrine.

For example, one of the theologians Tissa Balassuriya from Sri Lanka pointed out what was considered to be the Catholic doctrine on salvation prior to Vatican II. He wondered how could Christian doctrine have held and taught that all those who were not members of the Church were destined to eternal damnation? According to him, this teaching put many Asians outside the pale of salvation and he wondered whether this was

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<sup>382</sup> Ibid., 174.

<sup>383</sup> Ibid., 176.

the reason “why Christianity is accepted by only about 2% in Asia (excluding the Philippines).”<sup>384</sup>

Another founding father of Liberation theology, José Comblin wonders why Sobrino’s books were targeted. For him, Sobrino’s theology is “historically part of a debate that filled all of the twentieth century.”<sup>385</sup> Sobrino’s Christology was not built on the theology of incarnation, which has been considered as the most traditional since the fourth century. This kind of Christology started with the divinity of Jesus Christ and the incorporation of his divinity in human history. The new current of Christology that Sobrino followed placed emphasis on the human life of Jesus and, which culminated in his death and resurrection. José Comblin underlines that “The current theologians do not want to deny the doctrine of the Holy Scripture, nor that of the great councils, but they do not accept certain interpretations attributed to the Christian tradition, when they only belong to a theological tradition limited in time.”<sup>386</sup>

William Loewe also explains how the new current of Christology goes beyond a systematic understanding of classical conciliar dogma. For Loewe, the Notification should not be read in opposition to Sobrino’s Christology but should be understood within the theological inquiry and debate.<sup>387</sup> He states:

Sobrino can, however, be read from a different perspective. While scholastic Christology, fundamentally a metaphysically informed reflection on the dogmatic teaching of the Council of Chalcedon, once held the field, the past thirty years have been witnessing the emergence of a different paradigm among Catholic theologians (...) Sobrino’s work finds its home within this context.<sup>388</sup>

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<sup>384</sup> International Theological Commission of the Ecumenical Association of Third World Theologians, “Getting the Poor Down from the Cross: Christology of Liberation,” available at <http://www.eatwot.org/TheologicalCommission> (accessed 13 February 2017).

<sup>385</sup> Ibid.

<sup>386</sup> Ibid.

<sup>387</sup> William Loewe, “Interpreting the Notification,” in *Hope and Solidarity* (Ed. Stephen J. Pope; Maryknoll, NY:Orbis Books, 2008), 150.

<sup>388</sup> Ibid.



For the American Jesuit James T. Bretzke, Sobrino's Notification differs from other previous Notifications to other theologians in the sense that the CDF provided for the first time an Explanatory Note on the process used by the CDF.<sup>389</sup> He compares the CDF process to an independent review used by academic professors in the US when they go up for promotion. Bretzke mentions that during the promotional process, scholarly works are sent to experts for review. The result of the review can be positive but "there are often quite sharp disagreements among scholars in their assessments of another's work. To some extent this same sharp division of opinion is manifest in the Sobrino case."<sup>390</sup> For the American Jesuit, these two tensions always exist in processes. Nevertheless, Bretzke emphasizes that Sobrino and many respected theologians do not accept the CDF assessment. From Bretzke's point of view, the fact that many respected theologians (he does not list them) do not accept the Notification shows that Sobrino's work is legitimate and orthodox.<sup>391</sup> To illustrate his argument, the American theologian cites again the example of great theologians whose work was at some point criticised or held suspect by official church authority such as Thomas Aquinas, Karl Rahner, Henri de Lubac, Yves Congar.<sup>392</sup>

To sum up, the different reactions to the Notification showed that Sobrino's Christology is part of a new current of Christology, which has been developed for the past 30 years among Catholic theologians. This specific Christology starts from the life of Christ instead of the divinity of Christ. In addition, many theologians such as Leonardo Boff, Clodovis Boff, Gerry O'Hanlon gave their support to Sobrino's Christology and found it orthodox (even though Sesboué highlighted some technical

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<sup>389</sup> James T. Bretzke, "The Faith of the Church, the Magisterium, and the Theologian," in *Hope and Solidarity* (Ed. Stephen J. Pope; Maryknoll, NY:Orbis Books, 2008), 180.

<sup>390</sup> *Ibid.*

<sup>391</sup> *Ibid.*, 181.

<sup>392</sup> *Ibid.*, 182.

errors.) The Notification to Sobrino reminded some great theologians who were condemned in the past for their work but at the end of the day gained acceptance and approval from the church authority.

### **3.5 CONCLUSION**

The aim of this chapter was to examine critically the theological thought of Sobrino in order to gain greater understanding of his theological approach of the poor and the church of the poor. It was divided into three sections.

Firstly, we have realised that Sobrino's formula 'there is no salvation outside the Poor' is complex as Sobrino invites his readers to enter the mystery of the Poor. He notes that in the Poor, there is also the mystery of evil. This means that the Poor are not saints because they can kill each other, lie, and rape. Considering this ambiguity, this chapter has raised the following questions: How can Sobrino be sure that the Poor are the only setting for salvation? Can it be possible for the non-Poor also to be the setting for salvation? In addition, Sobrino invites his readers to understand his formula in the context of Liberation theology. It also notes how the contemporary history of theology indicates that some of the views of Liberation theology were not shared by the Magisterium. That was why the second section of this chapter was dedicated to the contentious relationship between the Magisterium and Liberation theology based on the two documents of the CDF entitled *Liberatis Nuntius* and *Libertatis Conscientia* 1984 and 1986.

In this second section, it emerged from LN that liberation is firstly liberation from the bondage of sin. The mission of the Church is to guide and to enlighten this aspiration for freedom of Christians. Besides, LN underlines the urgency of a better interpretation of the book of Exodus because Liberation theology gave a political interpretation not only to this book but also to the Scripture in general. Conversion is essential in the search for Justice. LN raises the alarm on the danger of the new interpretation of Christianity by

Liberation theology using the tools of Marxism. For LN, the search for justice should take into account the need for conversion, and the use of the Social Teaching of the Church. Concerning the second instruction LC, the CDF invites the readers to read it in the light of LN. The study of LC showed how the CDF went beyond the socio-economic interpretation of Christian freedom and liberation and brought out the complexity of Christian freedom and liberation. LC also highlights how the tragedy of sin complicates the quest for freedom and liberation. The Church suggests some principles to help the person in his/her process of liberation such as solidarity, subsidiarity, participation in the common good. The Church encouraged Christians to build a civilisation of love based on the life of Jesus in Nazareth. This section also analysed the theological reactions to LN and LC. It was noted that LN was more negative in the sense that it pointed out some 'erroneous' aspects of Liberation theology. LC went beyond this negative approach and focused on integral liberation. Leonardo Boff, one of the founding fathers of Liberation theology, welcomed it. However, can it be said that the publication of the two previous Vatican Instructions ended the controversial relationship between the Magisterium and some liberation theologians? This research tried to answer this question in the last section of this chapter by taking the example of Jon Sobrino.

This third section focused on Sobrino's relationship with the Magisterium by focusing on the Notification by the CDF of two of his books in 2006: *Jesuscristo liberator: Lectura historico-teologica de Jesus de Nazaret* and *La fe en Jesuscristo. Ensayo desde las victimas*. Two key issues were raised by the CDF: the methodological and doctrinal approaches of some of the extracts in Sobrino's books. Sobrino and other theologians reacted to this Notification such as, the Centre of Jesuits of Catalunya, Gerry O'Hanlon, and some of the theologians from the Ecumenical Association of Third World Theologians. Sobrino refused to adhere to the Notification because of his tumultuous

relationship with the CDF over the last three decades. Furthermore, he rejects the CDF Notification as he considers that these two books were translated into many languages and reviewed by many theologians. And none of them identified dangerous propositions as suggested by the CDF but only some technical errors. It also appeared from the study of the reactions of other theologians that Sobrino's Christology is part of a new current of Christology, which started from the life of Christ instead of the divinity of Christ. This chapter analysed some of them who showed their support to Sobrino's Christology and found his Christology orthodox even though, Sesboué evoked some technical errors. Inspired by the Notification, Sobrino supported that every theology should be done in a historical vacuum, "in the middle of concrete personal, social, cultural, and existential realities."<sup>393</sup> Another contemporary and eminent figure of the option for the Poor/vulnerable is Pope Francis, from Argentina, and like Sobrino, he is also a Jesuit. His education was shaped also by the world of Liberation theology. He will be the second character of our study in the next chapter of this research.

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<sup>393</sup> International Theological Commission of the Ecumenical Association of Third World Theologians, "Getting the Poor Down from the Cross: Christology of Liberation," available at [http:// www.eatwot.org/TheologicalCommission](http://www.eatwot.org/TheologicalCommission) (accessed 13 February 2017).

## CHAPTER FOUR

### HISTORICAL CONTEXT AND SOME BACKDROPS FOR INTERPRETING POPE FRANCIS' THEOLOGICAL THOUGHT

#### 4.1 INTRODUCTION

Jorge Mario Bergoglio, who became Pope Francis in 2013, is also a Jesuit like Jon Sobrino. He is from Latin America and he is committed to the poor and those on the fringes of society. To what school of thought does Pope Francis belong? Does he belong to the same school of theology (Liberation theology) as Sobrino? What is the origin of his love for the poor? This chapter attempts to answer these questions by exploring the influences on the theological thinking of Pope Francis and his relationship to the Argentinian' school of theology; then by analysing Pope Francis' reading of the *sensus fidei* and his understanding of the faithful. The answers to these questions will set the scene for the next chapter on the comparison between Francis and Sobrino precisely about the language they use to speak about the poor and the marginalised.

This chapter is split in two sections. The first section begins with a brief presentation of the development of Catholicism in Argentina. It highlights various influences on Pope Francis' thought, his relationship to his family, CELAM, and his relationship to the German theologian Romano Guardini. Finally, this section describes the strong influences of the *Aparecida Document* on Francis' socio-theological thought as a sign of his active participation in the meeting of CELAM in Aparecida, 2007 when he was Cardinal Bergoglio. The second section focuses on the journey into the theological world of Pope Francis by studying his understanding of Vatican II; exploring his relationship to the so-called 'theology of the people' or the Argentine theological school. The primary goal of this section is to question whether Francis claims any theological school or theological current. Also, in this section, the connection between the theology of the people and Liberation theology is briefly examined followed by Pope Francis'

conception of the people of God and especially the notion of *sensus fidei* is explained. Finally, some of his writings as Father Jorge Mario Bergoglio are reviewed in relationship to his writing as Pope Francis.

## **4.2 FRANCIS' HISTORICAL AND SOCIO-THEOLOGICAL BACKDROP**

### **4.2.1 Brief history of Latin American and Argentine Catholicism**

Enrique Dussel asserts that the history of Catholicism in Latin America goes back to the year 1492 when the Italian explorer Christopher Columbus discovered some of the islands of the Caribbean.<sup>394</sup> He states:

The history of the Church in Latin America falls into three well defined periods. (1) American Christendom: the colonial or Spanish American period (1492-1808). (2) Decline of American Christendom and rise of the national churches (1808-1962). (3) Break with Christendom and emergence of a new spirit<sup>395</sup>

Portugal and Spain received from the Holy See the responsibility and right to propagate the faith among the native peoples of the newly discovered lands. Dussel tells us that the Church was controlled by kings of Spain and Portugal. It is the so-called 'real patronado' or royal patronage.<sup>396</sup> For Keith Lemna, "In 1508, Pope Julius II gave authority to King Ferdinand of Spain to appoint bishops in the Spanish colonies in the New World, subject to papal approval.<sup>397</sup>" Spanish imperial rule ended in 1807 when the king of Spain, Ferdinand VII was imprisoned by Napoleon. By then, many countries had become independent through violent uprisings. The May Revolution of 1810 led to the independence of Argentina in 1816. Argentina is mostly Catholic even though the

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<sup>394</sup> Enrique Dussel, *A History of the Church in Latin America: Colonialism to Liberation (1492-1979)*, (Trans. Alan Neely; USA: Wm. B. Eerdmans, 1981), 38.

<sup>395</sup> Enrique Dussel, *The History of the Church in Latin America: An Interpretation* (Texas: Mexican American Cultural Center, 1974), 16.

<sup>396</sup> Dussel underlines that the Hispanic System of Patronado goes back to the year 1418 "when the Roman pontiffs gave to Spain not only jurisdiction over the peoples of the Islands but also the responsibility of defending them and of sending missionaries to them. (Ibid., 39)

<sup>397</sup> Keith Lemna, "Three Pathways into the Theological Mind of Pope Francis" in *Nova et Vetera*, English Edition, Vol. 12, No 1 (2014), 28.

percentage of those who practise the faith is relatively low. Pope Francis was born and raised during the period (1920-1962) the Church had recovered the unity it had under the Spanish American Christendom.<sup>398</sup> For Dussel, Catholic Action was well organised in the 1930<sup>s</sup> and “the Latin American Bishops’ Conference, which was promoted by Bishop Larrain of Chile and met in Rio de Janeiro in 1955, was of great significance, for the Latin American Bishop’s Council (CELAM) was created at this meeting.”<sup>399</sup> From a political perspective, Argentina faced political strife from the 1930<sup>s</sup>. The country until this point has enjoyed a period of democratic political development. Dussel states:

This historical period was ended in 1930 by a military coup, supported by the conservative oligarchy. The constitutionally-elected President, Hipolito Yrigoyen, was deposed, and the first de facto government in almost seventy years was installed. From 1930 up to 10 December 1983—and, in a sense even to this day –the armed forces have been the main players in the Argentine political scene. The military have installed regimes in the place of constitutionally-elected governments six times in fifty years: 1930, 1943, 1955, 1962, 1966 and 1976.<sup>400</sup>

From a theological outlook, the Jesuit theologian Allan Figueroa Deck refers to Argentina and Buenos Aires as “a fundamental *locus theologicus* for our times.”<sup>401</sup> In fact, he considers Argentina as a source of theological reflection because of the impact

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<sup>398</sup> Dussel, *Ibid.*, 27.

<sup>399</sup> *Ibid.* Austen Ivereigh calls the years 1930<sup>s</sup> in Argentina, a “Catholic spring” time. (Austen Ivereigh, *The Great Reformer: Francis and the Making of a Radical Pope* (New York: Henry Holt and Company, 2014), 21.

<sup>400</sup> Dermot Keogh (Ed.), *Witness to the Truth: Church and Dictatorship in Latin America* (Cork and Dublin: Hibernian University, 1989), 15.

<sup>401</sup> Allan Figueroa Deck, *Francis, Bishop of Rome: The Gospel for the Third Millennium* (New York: Paulist Press, 2016), 7. The article that he refers to is from Xavier Pikaza, “El Blog de X. Pikaza,” available at <http://blogs.periodistadigital.com/xpikaza.php>. The term *locus theologicus* refers to the famous book by the Spanish theologian Melchior Cano (1523-1560) entitled *De locis theologicis*. For Cano, the expression *loci theologici* applies “to a treatise on the fundamental principles or sources of theological science. (...) Cano observes that the “Queen of sciences” draws its arguments and proofs chiefly from authority, and only calls in reason as the handmaid of faith. Accordingly, he sets up ten loci — sources of theology — without, however, pretending to limit them to that number. They are: the authority of Holy Scripture, of Catholic tradition, of general councils, of the Roman Church, of the Fathers, of the Schoolmen; natural reason, the authority of philosophers and doctors in civil law, and the authority of history. The first seven are the proper places in which theology moves, the last three are useful auxiliaries.” (See Joseph Wilhelm, “Loci Theologici.” available at <http://www.newadvent.org/cathen/09320a.htm> (accessed 25/07/2017).

that Bergoglio's Buenos Aires roots have had on his life, ministry and vision as the 266<sup>th</sup> pope.<sup>402</sup> Deck states:

Jorge Bergoglio was born into this Argentine world of boom and bust. The Struggle of the poor and disenfranchised was something Jorge became aware of early in life along with the lack of solidarity among the social classes. This constituted for him a matter of grave concern to which he was to return often in his writing and preaching as archbishop. Being a child of the lower middle class, raised in a quintessentially lower middle-class barrio and a product of public schools rather than the more prestigious and exclusive Catholic schools undoubtedly left on him a sharp sense of social justice and more than a tinge of egalitarianism.<sup>403</sup>

#### **4.2.2. Bergoglio's Relationship with Family, CELAM and the Influence of Romano Guardini**

The quotation above highlights the milieu that nurtured and to an extent conditioned the thinking of Jorge Bergoglio, today's Pope Francis. The figure of Pope Francis is still

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<sup>402</sup> Ibid. The journalist John L. Allen in his book entitled *The Francis Miracle: Inside the Transformation of the Pope and the Church* describes the so-called Bergoglio story. The story of the Bergoglio family started in the 1920s in the northern Italian region of Piedmont. After the First World War, Italy experienced a deep social crisis. In this context of economic and political crisis, many Italians were looking for a solution and opportunity elsewhere. For Allen, "Argentina was a destination of choice, in part because in the 1920s it had a higher per-capita standard of living than virtually any country in Europe. Between 1860 and 1940, an estimated 1.4 million Italians settled in the country, and today it's believed that up to 24 million Argentines, representing roughly 60 percent of the entire population, have some Italian blood in their veins." (Ibid., 12) So, by 1927, two great-uncles of Pope Francis had already settled in Argentina and had founded a prosperous company in a port area (Paraná). Pope Francis' grandfather Giovanni Angelo Bergoglio and his grandmother Rosa decided to join his two brothers in Argentina in 1927. It happens that two years later Argentina was hit by the Great Depression. This latest crisis forced Pope Francis' grandparents to move again to Buenos Aires to a modest home. In the meantime, Pope Francis' father, José Bergoglio, supported the entire family through his job of bicycle deliveries around town. It is in this context that Mario José Bergoglio encountered Regina Maria Sivori the mother of the future Pope and their eldest child, Jorge Mario Bergoglio, today Pope Francis was born in 1936. (John L. Allen, *The Francis Miracle: Inside the Transformation of the Pope and the Church* (New York: Time book, 2015), 13.) In 1950, Bergoglio studied in secondary school as a chemical technician and also worked in a textile factory; In 1958, he entered the Society of Jesus; in 1960, he professed the first vows as a Jesuit and went to Chile to study humanities; In 1962, he received a degree in philosophy from the Colegio Maximo de San Jose in San Miguel (Argentina). He was ordained priest in 1969. "He became father provincial in 1973. The year 1976 is called the time of Argentina's 'Dirty War'. That year Bergoglio served as Provincial of the Jesuits in Argentina and was accused of not defending two Jesuit priests, Fr Franz Jalics and Fr Orlando Yorio. They "were arrested, tortured and illegally imprisoned by the military. It is suggested that Bergoglio had not supported and protected them – although he worked to have them released." (John Littleton and Eamon Maher eds., *The Francis Factor: A New Departure*, xiii); Pope John Paul II named him auxiliary bishop of Buenos Aires in 1992, and Bergoglio took over the role of archbishop of Buenos Aires in 1998 following the death of his predecessor. He began taking on responsibilities in Rome as well as in Argentina when John Paul II made him a cardinal in 2001. Bergoglio was elected Pope on March 13, 2013 and took the name Pope Francis" Amanda Lanser, *Pope Francis: Spiritual Leader and Voice of the Poor* (Minnesota: Abdo, 2014), 100. There are other biographies of Pope Francis such as: Elisabetta Piqué, *Pope Francis: Life and Revolution; a biography of Jorge Bergoglio* (Chicago: Loyola Press, 2013), 307-310; Paul Vallery, *Pope Francis: Untying the Knots* (London: Bloomsbury, 2013), 204-213;

<sup>403</sup> Deck, *Francis, Bishop of Rome*, 11.



complex as testified by Jimmy Burns in one of the special editions of *The Tablet* dedicated to *The Francis enigma*. Burns remarks that “if Francis remains enigmatic, it is because it remains far from clear to what extent his influences will shape and define his papacy.”<sup>404</sup> Figueroa Deck emphasises the Salesian influence on Francis. He notes that the parents of Jorge Mario Bergoglio (Mario José and Regina) met at a Salesian oratory. According to him, the Salesians have been very influential in Latin America and especially in Argentina because of their strong Italian origins. Their charism<sup>405</sup> emphasises the care for poor youth, young adults and promotes the Social Teaching of the Church. For Deck, the Salesian influence will appear in Jorge Bergoglio’s writings.

He states:

Many decades later, in the practice and writings of Jorge Bergoglio, the themes of concern for the poor (especially the youth), Catholic social teaching (especially the inadequacies of ‘savage capitalism’), and the centrality of the Virgin Mary’s witness of the Church’s evangelizing mission constitute powerful, recurring motifs in all his ministries as a Jesuit, bishop, archbishop, and now as pope.<sup>406</sup>

Deck also notes that Jorge Bergoglio was strongly influenced by his grandmother. They were very close and that was how Jorge Bergoglio came to learn their piedmontese dialect of Italian. The contact with his grandmother strengthened Bergoglio’s religious and spiritual life. Austen Ivereigh also supports this view when he affirms that “the single greatest childhood influence on Jorge Bergoglio was his grandmother Rosa, a formidable woman of deep faith and political skill, with whom he spent most of his first five years.”<sup>407</sup> In addition, the fact that women, especially mothers

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<sup>404</sup> Jimmy Burns, “Enigmatic leader at the moral frontier” in *The Tablet*, 14 March 2015, 5.

<sup>405</sup> This word is from the Greek word *charisma* which means free gift, favour. For Wilfrid Harrington, “it is Paul who introduced the term into religious language: the word means a free gift of grace (...) it is a supernatural gift bestowed by the Holy Spirit for building up the body of Christ. A charism is a gift which has its source in the *charis*—grace or favour—of God and which is destined for ‘the common good’ (1Cor 12:7).” (Wilfrid Harrington, “Charism,” in *The New Dictionary of Theology* (eds Joseph A. Komonchak, Mariy Collins and Dermot A. Lane; Dublin: Gill and Mcmillan Ltd, 1987), 180.

<sup>406</sup> *Ibid.*, 9.

<sup>407</sup> Austen Ivereigh, *The Great Reformer: Francis and the making of a Radical Pope* (New York: Henry Holt and Company, 2014), 13.

and grandmothers, are involved in evangelization in Latin America would shape Bergoglio's vision of the role of women in the new evangelization as it emerges from the *Concluding Document of Aparecida* in 2007 and in *Evangelii gaudium*.<sup>408</sup> Francis' relationship to Aparecida Conference will be studied in the next section.

Jorge Bergoglio also grew up in the context of the dramatic expansion of the Catholic Church. Ivereigh calls it a 'Catholic spring' in the 1930s. For Ivereigh, it was an intellectually confident Church. He justifies this assertion by pointing to the fact that there was a "network of newspapers, magazines, and radio stations, along with the leading Church publisher (...). In the 1940s and 1950s, hundreds of thousands of Catholics – among them the young Jorge Bergoglio—joined Catholic Action's study circles."<sup>409</sup> Ivereigh adds that Bergoglio grew up in the context where 'liberal' was understood and associated with free-market.<sup>410</sup> The alternative to liberalism was nationalism.<sup>411</sup>

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<sup>408</sup> Ibid. For Deck, Pope Francis' background has been a source of inspiration when he repeatedly calls for a deeper theology of women in the Church and for their participation in the Church's life. To support Pope Francis' point of view on the role of women in the Church, Deck reports Pope Francis' joke at one of his first Angeluses. He states: "In his first greeting at the Angelus on March 17, 2013, to illustrate his kerygmatic theme of God's unconditional love and mercy, Pope Francis gave the example of a pious lady who wanted to go to confession and grasped quite well the central truth of God's mercy. Father Bergoglio jokingly asked the lady whether she had any sins and, if she did, whether God really would forgive them. She answered without hesitation that of course God would forgive them because he always does. Impressed by the lady's theological acumen, Bergoglio playfully replied, 'Madam, did you study at the Gregorian?'" (Ibid., 10) About women's role in the Church, there is a paragraph of an article talking about women's place in the Church (Aidan Troy, "Borrowing an Idea from the Pope" in *The Francis Factor: A New Departure*; eds. John Littleton and Eamon Maher (Dublin: the Columba press, 2014), 174.) Explaining that in the past he consulted a Jewish woman psychotherapist, the Irish Times states about Pope Francis: "The disclosure came when Francis was discussing the role and influence of the "courageous" women in his life, including his mother, his two grandmothers and Esther Ballestrino de Careaga, the communist founder of the Mothers of the Plaza de Mayo movement in Buenos Aires, who was killed during the dictatorship. He also spoke of childhood sweethearts and adolescent girlfriends, saying his relationships with women had enriched his life." (The Irish Times, "Pope Francis reveals he consulted psychoanalyst for six months" available at <https://www.irishtimes.com/news/world/europe/pope-francis-reveals-he-consulted-psychoanalyst-for-six-months-1.3206595> (accessed 03/09/2017). The movement of the Mothers of the Plaza de Mayo was formed by the mothers of the missing children under the dictatorship.

<sup>409</sup> Ivereigh, *The Great Reformer*, 21.

<sup>410</sup> Keith Lema speaks about the word 'liberal' as a term referring "to Enlightenment thinking which gave rise to the American and French revolutions and to the many revolts against Spanish rule in nineteenth-century Latin America. However, Latin America liberal thinking came directly from Europe, spreading there with the European revolutions that swept through Europe in 1848." (Keith Lema, "Three Pathways into the Theological Mind of Pope Francis" in *Nova et Vetera*, English Edition, Vol. 12, No. 1 (2014), 29.)

<sup>411</sup> Ibid., 22.

Reflecting on Pope Francis as ‘an enigmatic leader at the moral frontier’, Jimmy Burns remarks that Jorge Bergoglio also experienced when growing up the political corruption and widening social divisions.<sup>412</sup> He reports that the only elected government that survived during the early years of Jorge Bergoglio’s life without being overthrown by a coup was the government led by General Juan Perón (1946-1955). For Burns

No life of Jorge Bergoglio can make sense without an acknowledgement of Perón’s influence. Bergoglio chose to become a priest just at the time that the bishops and clergy broke with the Perón regime over the issue of divorce and the state’s intrusion into religious education and were headed for confrontation.<sup>413</sup>

Deck does also bring to the fore other influences on Jorge Bergoglio. For example, he underlines the influence of Helder Camara and CELAM (Bishops Conference of Latin America and Caribbean.) As a young Jesuit and provincial, bishop and archbishop, Bergoglio has been nurtured by the spirit of CELAM. CELAM has been used as space for the development of theological reflection. Deck states:

CELAM has been the driving force behind a continuous and coherent process of theological reflection and pastoral action from 1955 at its inception in Rio de Janeiro to the present. With headquarters in Bogota, CELAM has provided a space for the development of vibrant and ongoing theological reflection that has been renewed over the decades by four impressive, hemispheric gatherings of the bishops of Latin America and the Caribbean.<sup>414</sup>

One of the founding fathers of CELAM is Dom Helder Camara. He died in 1999 as Emeritus Archbishop of Recife-Olinda in the Northeast of Brazil. For the Jesuit, Deck, there are similarities between Pope Francis’ views and those of Dom Helder. In fact, “both experienced the interests in social, economic and political change in Latin America.”<sup>415</sup> Dom Helder became a defender of the option for the poor in the spirit of

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<sup>412</sup> Jimmy Burns, “Enigmatic leader at the moral frontier” in *The Tablet*, 14 March 2015, 4.

<sup>413</sup> Ibid. Burns also describes that under Perón’s regime, “the notion of Perón championed – that social justice can be reached by a balancing of the interests of capital and labour – touched the hearts of lower-middle-class immigrant Catholic families like the Bergoglios.” (Ibid.)

<sup>414</sup> Ibid., 33.

<sup>415</sup> Ibid., 34.

Liberation theology. According to Deck, “Dom Helder had a personal style of speaking and living somewhat reminiscent of Jorge Bergoglio.”<sup>416</sup> Talking about the influence of CELAM on Pope Francis, the Venezuelan theologian Rafael Luciani mentions for example that

In the midst of all the debates and proposals after Puebla, in 1985 while he was rector of the Colegio Máximo, the then father Bergoglio organised a conference under the title: Congress on the Evangelization of Culture and Inculturation of the Gospel (...) Bergoglio gave the opening address, in which he emphasized how important it is that we approach the life-world of the people in order to be able to generate process of evangelization that will give momentum to social changes.<sup>417</sup>

In 1986, Father Jorge Mario Bergoglio travelled to Germany to begin a doctoral thesis on Romano Guardini. However, he decided to return to Buenos Aires after some months.<sup>418</sup> Reflecting on the Social thought of Pope Francis, the Jesuit Theologian Christoph Theobald notes that Pope Francis is inspired by this Italo-German philosopher and theologian Romano Guardini.<sup>419</sup> According to Theobald, Pope Francis’ frequent references to Guardini’s book entitled *La fin des temps modernes (1950)* is testament to

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<sup>416</sup> Ibid. Concerning Bergoglio’s ministry in Buenos Aires, John O’Connor mentions some important aspects that the future Pope brought to the Church of Buenos Aires such as his humility; his good relationship with his priests; his clear separation between Church and State; his commitment to social justice; the human rights marked by the military dictatorship, and his commitment to the inter-faith dialogue (O’Connor, “Bergoglio and the Buenos Aires connection,” 13-14.)

<sup>417</sup> Rafael Luciani, *Pope Francis and the Theology of the People* (Maryknoll, NY: Orbis, 2017), 81.

<sup>418</sup> Elisabeth Piqué, *A Biography of Jorge Bergoglio, Life and Revolution: Francis* (Chicago: Loyola Press, 2013), 308.

<sup>419</sup> Christoph Theobald, “L’enseignement social de l’Église selon le Pape François,” in *La pensée sociale du pape François* (Paris : Jésuites, 2016), 15. Rosino Gibellini describes Guardini as one of the outstanding voices of Catholic theology of the 20<sup>th</sup> Century. Guardini could be named along the same line as some well-known thinkers such as Alfred Loisy, Maurice Blondel, Pierre Teilhard de Chardin, Henri de Lubac, Jean Daniélou, Marie Dominique Chenu, Yves Congar, Karl Rahner. Gibellini highlights that Guardini started to teach in the year 1923 at the University of Berlin and echoed the Catholic voice in the lay and Protestant university. He brought in this world the “Catholic ethos” called the “Weltanschauung Catholique” or the vision of the world from the Catholic perspective. For Guardini, Christian faith sheds light on the entire reality of the world through the Catholic Church. Gibellini states : “La foi chrétienne offre donc une vision de la totalité concrète du monde. Mais, pour Guardini, c’est l’Église catholique qui est « porteuse du regard du Christ sur le monde » et Weltanschauung catholique est donc « le regard que l’Église porte sur le monde, dans la foi, du point de vue du Christ vivant, et transcendant tout modèle dans la plénitude de sa totalité.” (Rosino Gibellini, *Panorama de la Théologie au XX<sup>e</sup> Siècle* (Paris : Cerf, 2004), 248-249. Also see the book of Joshua Furnal where he describes the influence of Kierkegaard on Guardini. (Joshua Furnal, *Catholic Theology after Kierkegaard* (Oxford: Oxford University press, 2016), 78-83.) Also see Juan Carlos Scannone, “Du Bien au Meilleur : Un Discernement Spirituel Enraciné in la Tradition de Saint Ignace” in *Divorces Remariés : Ce qui change avec François* (Ed. Philippe Bordeyne; Paris: Salvator, 2017), 116-23.

this point. For instance, Theobald notes that chapter 3 of the encyclical *Laudato Si'* (hereafter LS) draws a lot from *La fin des temps modernes* as Francis refers to it seven times: LS 105,108, 115, 203, 219.<sup>420</sup> For bishop Robert Barron, “it is only against this Guardinian background that we can properly read the Pope’s latest encyclical. Whatever his views on global warming, they are situated within the far greater context of a theology of nature that stands athwart the typically modern point of view.”<sup>421</sup> For Father Eugene Hemrick, “both Fr Guardini and Pope Francis raise the question, what is our worldview? Are we to be served by the world or are we to serve it? Are we to live with little concern about the future or are we to be deeply concerned about the world’s wellbeing?”<sup>422</sup> On the occasion of the 130<sup>th</sup> anniversary of Guardini’s birth, Pope Francis acknowledges that “Guardini is a thinker who has much to say to the men of our time, and not only to Christians.”<sup>423</sup> Pope Francis praises Guardini’s understanding of the concept of ‘people’ as follows:

Guardini understands the concept of “people” by distinguishing it clearly from an Enlightenment rationalism that considers real only that which can be received by reason (cf. “The Religious World of Dostoyevsky,” p. 321) and that tends to isolate man, tearing him away from vital natural relations. Instead, the people mean: the compendium of what is genuine, profound, essential in man (Ibid., p. 12). We can recognize in the people, as in a mirror, the “field of strength of the divine action.” The people — Guardini continues — “feel this operating everywhere and intuits the mystery, the restless presence” (Ibid., p. 15). Therefore, I like to say — I am convinced of it — that “people” is not a logical category, but a mystical category, for the reason that Guardini says.<sup>424</sup>

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<sup>420</sup> Ibid. Also see Gaspar Hernández Peludo, “El trasfondo de Romano Guardini en la encíclica *Laudato Si'*,” in *Laudato Si' Mi Señor y Ecología Integral: Comentario a la encíclica *Laudato Si'* del Papa Francisco* (Salamanca: Universidad Pontificia de Salamanca, 2016), 229-64.

<sup>421</sup> Robert Barron “*Laudato Si'* and Romano Guardini,” available at <https://www.catholicnewsagency.com/column/laudato-si-and-romano-guardini-3245> (accessed 14/11/2017).

<sup>422</sup> Eugene Hemrick, “Guardini’s thought seen in *Laudato Si'*,” <https://www.nzcatholic.org.nz/2015/08/21/guardinis-thought-seen-in-laudato-si/> (accessed 14/11/17). Also see Di Gennaro Cicchese, “Uno sguardo cristiano sul mondo. Romano Guardini e la *Laudato si'*” available at <file:///C:/Users/home/Downloads/articoloUC26775.pdf> (accessed 14/11/2017).

<sup>423</sup> Ibid.

<sup>424</sup> Ibid.

### 4.2.3 Influences of the Aparecida Conference on Pope Francis

The Fifth General Conference of the Bishops of Latin America and the Caribbean of Aparecida in Brazil was the very last one in which Cardinal Jorge Mario Bergoglio had participated before his election as Supreme Pontiff. His participation was remarkable since he was elected by his brother bishops to lead the important committee charged with drafting the final document.<sup>425</sup> For Keith Lemna, the Aparecida document (hereafter AD) should be considered if someone wants to understand Pope Francis. According to him:

The AD is a well-thought-out document (or rather, a coherent series of documents) that is thoroughly Trinitarian in theology (see especially paragraph 14, put there through a “decisive intervention” by then-Cardinal Bergoglio) and exhibits a communion-influenced ecclesiology. Its primary focus is on missionary evangelization, and every concern it presents is discussed in this context (...) The AD seems to correspond with the tenets of the *teologia del pueblo*, which makes sense since the latter arose from reflection on *Evangelii Nuntiandi* and *Gaudium et Spes*, ecclesial texts which likewise form a basis for Aparecida.<sup>426</sup>

The theme of this fifth conference held in 2007, was “Disciples and missionaries of Jesus Christ.” The AD had three parts and 554 numbers. The first part describes the life of Latin American and Caribbean people at the time when the meeting was held using

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<sup>425</sup> Ernesto Cavassa, “On the Trail of Aparecida: Jorge Bergoglio and the Latin American ecclesial tradition,” available at <https://www.americamagazine.org/voices/ernesto-cavassa-sj> (accessed 16/10/2017). In addition, the book of Massimo Borghesi, *Jorge Mario Bergoglio. Una biografia intellettuale*, points out another remarkable intellectual theologian who influenced Pope Francis. For him the French Jesuit theologian Gaston Fessard, who was an associate of another great French Jesuit theologian Henri de Lubac is a point of reference in the theological thinking of Pope Francis. Jorge Mario Bergoglio was introduced to the thinking of Gaston Fessard by his professor of philosophy at the colegio Máximo de Buenos Aires. He states: “As the Pope told me: “The writer...who had a major influence on me was Gaston Fessard. I read many times his *La dialectique des Exercices spirituels de Saint Ignace de Loyola* along with other things of his. He gave me so many of the elements that later got mixed.” (Massimo Borghesi, “Living with contradiction,” in *The Tablet*, (10 February 2018), 4.) According to Massimo Borghesi, this revelation has great importance and gives a key to understand Pope Francis’ genesis of thought. Borghesi also mentions that “In a book published in 1956, Fessard analyses the spirituality of Saint Ignatius by starting from the tension between grace and freedom, between the infinitely big and the infinitely small, between contemplation and action. Rather than choosing one or the other, the Christian life is found in unresolved tension between them. Bergoglio has remained profoundly influenced by this dynamic interpretation of the *Exercises*. He uses the Spanish word *tensionante* to describe a way of thinking that recognises opposite poles and seeks to hold them in tension, rather than to resolve the apparent contradiction between them.” (Ibid.)

<sup>426</sup>Lemna, “Three Pathways into the Theological Mind of Pope Francis,” 34.

the ‘see-judge-act’ method (no 19).<sup>427</sup> The second part is about the life of Jesus Christ in ‘missionary disciples’. It covers themes like: the joy of being missionary disciples, the vocation of Christians to holiness, the communion of missionaries in the church and the formative itinerary of missionary disciples. The third part refers to the life of Jesus Christ for the people of Latin America and the Caribbean. It also highlights the consequences of the mission of the disciple in the daily life of Latin American and Caribbean people. It is in this part that the Bishops mentioned the relationship between the Kingdom of God and the promotion of human dignity with a special attention to the poor (AD 380).

The promotion of human dignity is part of the transforming reality of the kingdom of God present in Jesus Christ. For CELAM, being disciples and missionaries of Jesus is to be merciful to those whose lives are violated in any dimension (AD 384). The works of mercy should be combined with the pursuit of true social justice and the promotion of citizens so that they can become agents of their own development (AD 385). For CELAM, the preferential option for the poor is implicit in the theological faith in a God who identified himself with the poor in Jesus Christ, in order to enrich humanity (AD 392). For Lemna, this commitment of CELAM reminds us of Pope Francis’ call to the Church to go out to the peripheries of society.<sup>428</sup>

As the preferential option for the poor is inherent in Christological faith, Christians are invited to contemplate the face of Christ in the suffering faces of their sisters and brothers. The presence of the suffering faces in Latin America and the Caribbean questions not only the church’s action and ministry but also Christian attitudes

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<sup>427</sup> It is said that Pope Francis’ theological approach is built on the Aparecida’s method. The next chapter will explore it when comparing Sobrino’ theological method and Pope Francis’ theological approach. See for example the article of Gerard Whelan, “Evangelii Gaudium as “Contextual Theology”: Helping the Church “Mount to the Level of its Times” in *Australian ejournal of Theology*, 22.1 (April 2015), 1-10. It is also online.

<sup>428</sup> *Ibid.*, 39.

in Latin America society (AD 393). Therefore, CELAM emphasised the principle of solidarity as

a permanent attitude of encounter, brotherly and sisterly spirit, and service which is to be manifested in visible options and gestures, primarily in defence of life and of the rights of the most vulnerable and excluded, and in continual accompaniment in their efforts to be agents for changing and transforming their situation (no 394).

For the AD, opting for the poor should not be limited to solidarity but there should be special attention given to Catholic professional people who are involved with finances, those who promote employment and Catholic politicians. The aim is to provide them with ethical guidelines, which are in consonance with their faith. CELAM committed itself to ratify and energize the preferential option for the poor made by the previous Conferences (AD 396). The bishops of Latin America and the Caribbean felt the responsibility to inform lay people of supporting major issues of international justice so that they might be able to take public responsibility in solidarity with the life of the people (AD 406). In a concrete way, CELAM painted what it called the 'suffering faces' of Latin America and the Caribbean. These paintings carried faces of people like: street people in large cities, migrants, sick people, addicts and the imprisoned. These new faces of the poor caused by globalization were the challenge set before the disciples and missionaries of Jesus Christ. It included victims of violence, victims of human trafficking and kidnapping, boys and girls who are victims of prostitution and trafficking for sex exploitation, etc. (AD 402). For the AD, concrete actions should be undertaken with pastoral creativity to influence governments to enact social and economic policies that lead towards sustainable development (AD 403). The Church of Latin America and the Caribbean should use the rich legacy of the Church's social teaching. Ethics, solidarity and genuine humanism can help lay people to undertake important tasks in society.



Cardinal Bergoglio's contribution to the document was significant as he identified as his first concern the call for a pastoral conversion.<sup>429</sup> For Lemna, "among the elements of pastoral concern he highlights is the need for pastors to examine their activities to ensure that they are predominantly pastoral rather than administrative."<sup>430</sup> Another Jesuit Ernesto Cavassa studying the relationship between Jorge Bergoglio and the Latin American ecclesial tradition states that at the Fifth General Conference of CELAM, Jorge Cardinal Bergoglio was elected by his brother bishops to chair the important committee charged with drafting the final document. For Cavassa, "this was not an incidental fact but a token of his leadership in such events."<sup>431</sup> Cavassa highlights three things that have been part not only of the Aparecida Conference but also of other previous conferences of CELAM: A poor Church for the poor, Christ is the Centre and going to the periphery.<sup>432</sup> These three things are found in Pope Francis' main Apostolic letters and Exhortations especially his first Apostolic Exhortation, *Evangelii Gaudium*, which is considered as a road map for his papacy. In this latter document, Pope Francis refers to the AD eleven times whereas he does just twice in *Laudato Si'* (hereafter LS) and once in *Amoris Laetitia* (hereafter AL)<sup>433</sup>

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<sup>429</sup> For Paul McPartlan, the "pastoral conversion" is the reform programme of Pope Francis. (See Paul McPartlan, "Pastoral Conversion": The Reform Programme of Pope Francis," in *Ecclesiology*, 14 (2018), 125-32.

<sup>430</sup> Lemna, 42.

<sup>431</sup> Ernesto Cavassa, "On the Trail of Aparecida: Jorge Bergoglio and the Latin American ecclesial tradition," available at <https://www.americamagazine.org/voices/ernesto-cavassa-sj> (Accessed 16/10/2017).

<sup>432</sup> Ibid.

<sup>433</sup> For example, Pope Francis is inspired by AD 360 to emphasize the need to communicate life. He states: "The Gospel offers us the chance to live life on a higher plane, but with no less intensity: 'Life grows by being given away, and it weakens in isolation and comfort. Indeed, those who enjoy life most are those who leave security on the shore and become excited by the mission of communicating life to others'." (EG 10). In another number, Pope Francis referring to AD 548 expresses the necessity for the Church to get out and to go to the periphery. We read: "Along these lines the Latin American bishops stated that we 'cannot passively and calmly wait in our Church buildings'; we need to move 'from pastoral ministry of mere conservation to a decidedly missionary pastoral work ministry.'" (EG 15, see also EG 20) Pope Francis also mentions AD 201 which invites priests who are in service in the parishes to new attitudes. AD underlines the need for conversion for pastors who are involved in pastoral because "'mere administration' can no longer be enough." (EG 25). When talking about popular piety, Pope Francis also refers to AD 262 and 264. Quoting Benedict XVI in his inaugural speech at Aparecida, Francis underlines the precious treasure

To sum up, it is arguable that the meeting at Aparecida was in some ways in continuity with the previous conferences of CELAM especially Medellin and Puebla. The general approach and methodology used is see-judge-act. For Virgilio Elizondo, it is a collaborative theology in the sense that the AD offered evidence of the distinctive aspect of Latin American theology, based not only on the social reality but also on “the product of the serious deliberations of bishops, theologians, priests, religious and laity.”<sup>434</sup> AD considered both sides of globalization (advantages and disadvantages) and highlighted the new faces of the victims of globalization.

Concerning the poor, AD was influenced by the opening speech of Pope Benedict XVI on the preferential option for the poor as implicit in Christological faith. At Medellin and Puebla CELAM underlined the situation of injustice in Latin America and invited the whole Church to be witnesses of Jesus by fighting against poverty and by changing lifestyles. It meant, fighting for justice and promoting solidarity. At the Aparecida

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contained in popular piety (EG 123). Inspired by AD 262 and 264, he asserts: “The AD describes the riches which the Holy Spirit pours forth in popular piety by his gratuitous initiative. On that beloved continent, where many Christians express their faith through popular piety, the bishops also refers to it as ‘popular spirituality’ or ‘the people’s mysticism’. It is truly ‘a spirituality incarnated in the culture of the lowly’ (...) It is ‘a legitimate way of living the faith, a way of feeling part of the Church and a manner of being missionaries’” (EG 124) Reflecting on the universal destination of the mission of proclaiming the good news of Jesus Christ (AD 380), Francis recalls that the mission of evangelization “encompasses all dimensions of existence, all individuals, all areas of community life, and all peoples.” (EG 181). Francis also defines the theological sense for the option of the poor by referring to Benedict XVI’s inaugural speech at Aparecida which recalled that the option for the poor ‘is implicit in our Christian faith in a God who became poor for us, which is poor and for the poor.’” (EG 198) Inspired by AD 86 which expresses the concern about the growing assault on biodiversity and ecology in general and the Amazon and the Antarctic in particular, Francis asks for a balance between the huge global economic interests which, under the guise of protecting them, can undermine the sovereignty of individual nations because “there are ‘proposals to internationalise the Amazon which would only serve the economic interests of transnational corporations’.” (LS 38) Referring to AD 471, Francis denounces the weak international political responses on the environment because of self-interests of powerful corporations. We read: “The AD urges that ‘the interests of economic groups which irrationally demolish sources of life should not prevail in dealing with natural resources’. The alliance between the economy and technology ends up side-lining anything unrelated to its immediate interests.” (EG 54) Finally, Francis refers to AD 457 about the dignity and participation of women in society. In this perspective he highlights diverse ways to live motherhood for the couples who are unable to have children. For Francis, “Even in cases where, despite the intense desire of the spouses, there are no children, marriage still retains its character of being a whole manner and communion of life and preserves its value and indissolubility. So too, ‘motherhood is not a solely biological reality, but is expressed in diverse ways’. (EG 178) Also see Thomas Michelet, *Les Papes et l’Ecologie : 50 ans – 50 textes de Gaudium et Spes à Laudato Si’ (1965-2015)* (Paris : Arpège, 2016).

<sup>434</sup> Virgilio Elizondo, “Collaborative Theology: Latin American Bishops, the Pope and the Poor,” <https://www.commonwealmagazine.org/collaborative-theology-0> (accessed 04/05/2016), 8.

conference, there was a shift. According to this conference the fight for justice and the promotion of solidarity are inherent in the Christian's faith in Jesus. This shift led some analysts to note that a strong emphasis on social justice and structural sin was missing at Aparecida.<sup>435</sup> Nonetheless, it is arguable that Medellin, Puebla and Aparecida, in different respects, joined their efforts to implement Vatican II and to build the poor church for the Poor.<sup>436</sup>

### 4.3. JOURNEY INTO FRANCIS' THEOLOGICAL WORLD

Since the election of Pope Francis, several theologians and writers have tried to define what could be called today his theological thought. Among the representations of Pope Francis, there are two that deserve to be emphasized here. The first one concerns the front page of *The Tablet* of February 18, 2017, which portrays Pope Francis, with the expression "Understanding Francis". One can see that the image of his head is divided into several compartments with the following words: prayer, justice, mercy, joy, discernment, love, accompaniment, forgiveness, hope, conversion, grace, reform, compassion, renewal.<sup>437</sup> The second image is the cover of the book of French journalist Nicolas Senèze whose title is: "Les Mots du Pape", which means the words of the Pope. He also enumerates and develops ten words without which one could not understand Pope Francis. These words are: Jesuit, people, margins, worldliness, migrants, waste, economy, dialogue, family, and mercy. The question here is: Amid such literature, how does one get to the heart of Pope Francis's theological thinking? There is no doubt that it is a daunting task if not an impossible one to get to the heart of Pope Francis theological

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<sup>435</sup> Pierre Hegy, "A critical note on Aparecida and the future of the Catholic Church of Latin America" in *Social Compass* online on scp.sagepub.com (accessed 04/05/2016), 539.

<sup>436</sup> Ibid.

<sup>437</sup> Also see Mariano Fazio, *Le Pape François : Les Clés de sa Pensée* (Paris : Le Laurier, 2013). Pape François, *L'Eglise selon le Cœur du Pape François : Amour, Service, & Humilité* (Paris : Magnificat, 2013). Andrea Riccardi, *Comprendre Le Pape François : L'itinéraire d'un homme qui veut changer l'Eglise et le monde* (Paris : L'Emmanuel, 2015).

thought. Nevertheless, this section will try to understand Pope Francis' theological thought by studying: his relationship to Vatican II, his contact with the 'Theology of the People', and his understanding of the people and *sensus fidei*.

### 4.3.1 Pope Francis And Vatican II

Rocco D'Ambrosio observes that "Pope Francis—as many have observed—can be understood only in the light of Vatican II."<sup>438</sup> D'Ambrosio highlights especially Pope Francis' insistence on bringing the Church into modernity. He refers, for example, to his homily at the inaugural mass of the Jubilee Year of Mercy on the 8<sup>th</sup> December 2015 as follows:

Today, as we pass through the Holy Door, we also want to remember another door, which fifty years ago the Fathers of the Second Vatican Council opened to the world. This anniversary cannot be remembered only for the legacy of the Council's documents, which testify to a great advance in faith. Before all else, the Council was an encounter. A genuine encounter between the Church and the men and women of our time.<sup>439</sup>

For D'Ambrosio, Pope Francis' "reference to the 'open door' recalls a remark that has been attributed to Pope John XXIII."<sup>440</sup> In addition to the concept of openness, the Holy Father also underlines the necessity of encounter, which is the spirit of Vatican II. In his interview with his fellow Jesuit Spadaro when asking how he can harmonise the Petrine primacy and collegiality, Francis answers:

We must walk together: the people, the bishops, and the pope. Synodality should be lived at various levels. Maybe it is time to change the methods of the Synod of Bishops, because it seems to me that the current method is not dynamic. This will also have ecumenical value, especially with our Orthodox brethren.<sup>441</sup>

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<sup>438</sup> Rocco D'Ambrosio, *Will Pope Francis Pull It Off? The Challenge of Church Reform* (Trans. Barry Hudock; Minnesota: Liturgical Press, 2016), 7.

<sup>439</sup> Pope Francis, "Pope Francis: Homily for Inauguration of the Jubilee," available at [http://en.radiovaticana.va/news/2015/12/08/pope\\_francis\\_homily\\_for\\_inauguration\\_of\\_the\\_jubilee/1192758](http://en.radiovaticana.va/news/2015/12/08/pope_francis_homily_for_inauguration_of_the_jubilee/1192758) (accessed 2011/2017).

<sup>440</sup> D'Ambrosio, *Ibid.*

<sup>441</sup> Antonio Spadaro, *A Big Heart Open To God: A Conversation with Pope Francis* (New York: HarperCollins, 2013), 39.

Talking about the meaning of Vatican II, Francis states:

Vatican II was a rereading of the Gospels in light of contemporary culture (...) produced a renewal movement that simply comes from the same gospel. Its fruits are enormous. Just recall the liturgy. The work of liturgy reform has been a service to the people as a rereading of the Gospels from a concrete historical situation. Yes, there are hermeneutics of continuity and discontinuity, but one thing is clear: the dynamic of reading the Gospels, actualizing its message for today—which was typical of Vatican II—is absolutely irreversible.<sup>442</sup>

Martin Schlag points out another aspect of Francis' connection to Vatican II. For him, "Pope Francis seems to be more concerned with pastoral issues than with doctrinal or teaching."<sup>443</sup> For him, Francis' approach is the originally intended pastoral approach of Vatican II. Schlag calls Pope Francis' approach 'pastoral hermeneutics' or a 'hermeneutics of evangelization.'<sup>444</sup> He asserts:

After the confusion and polarization of the post-conciliar period, Francis seems to say that we can now finally get to work on what the Second Vatican Council was actually all about. It is not so much about doctrinal and dogmatic decisions but about going out to bring the faith to the men and women of our time. A pope is free to choose his own style and his own priorities, his own hermeneutics.<sup>445</sup>

Schlag is aware that his quotation might raise questions and that is why he invites the readers of Pope Francis' texts to adapt to this change of style in the exercise of the papacy. Pope Francis wants to move the heart and not to make theories. For this reason, he always refers to his principle that "realities are more important than ideas."<sup>446</sup> Nevertheless, Pope Francis like his predecessors highlights some themes in continuity with the Social Teaching of the Church in general and Vatican II.

Quoting Cardinal Cormac Murphy-O'Connor, Christopher Lamb asserts that Pope Francis is implementing the Second Vatican Council in three words: Collegiality,

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<sup>442</sup> Ibid., 43.

<sup>443</sup> Martin Schlag, *The Business Francis Means: Understanding the Pope's message on the Economy* (Washington: The Catholic University of America Press, 2017), 51.

<sup>444</sup> Ibid., 52.

<sup>445</sup> Ibid.

<sup>446</sup> Ibid. see EG, 231-33 and LS 110, 201.

synodality and subsidiarity.<sup>447</sup> For example, in the encyclical *Lumen Fidei*, Francis underlines how faith can be at the service of Justice and the Common Good. It is said that number 50 to 60 constitute the major contribution of Pope Francis in the encyclical.<sup>448</sup>

For Aldo Marcelo Cáceres,

Under the title, God prepares a city for them, we find a good summary of some of the major social questions that the cardinal has always been concerned about. In the first place, we find one of his constant invitations to recognize the richness of our social dimension and what it commits us to. He insists that we capture its deep meaning so that it can be deployed in the life of the community. Because it is our social nature that calls us to build a good coexistence; by it we are summoned and forced to surrender for the common good.<sup>449</sup>

Pope Francis stresses the idea that Christian faith can provide a service to the common good because faith can transform the person and make that person to be open to love. The power of faith and love enlightens the path of that person and enables him or her to see reality with new eyes. (LF 26) Therefore, the light of love proper to faith can

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<sup>447</sup> Christopher Lamb, "Francis on the front foot," in *The Tablet* (30 September 2017), 4. Here also see the study of Richard R. Gaillardetz on *Pope Francis and the reception of Vatican II*. (Richard R. Gaillardetz, *An Unfinished Council: Vatican II, Pope Francis, and the Renewal of Catholicism* (Collegeville: Liturgical Press, 2015), 115-35.

<sup>448</sup> The Jesuit review *America* invited many writers, theologians and leaders of the Church to react to *Lumen Fidei*. All the articles can be found online at [www.americamagazine.org/light-faith](http://www.americamagazine.org/light-faith) (accessed the 04/07/2017). The title of the collection is "Francis on the 'Light of Faith': First responses to 'an encyclical written with four hands'". The American Jesuit Drew Christiansen who is one of the contributors to the reflection on Francis' first encyclical remarks that "Except for one introductory passage in which Pope Francis speaks of Benedict's preparation, it is more difficult to make out Francis' own contribution" (Ibid.) He also suspects that Pope Francis wrote Chapter 3, "I Delivered to You What I Also Received," which treats of the transmission of faith; and Chapter 4, "God Prepares a City for Them." It is precisely in chapter 4 that is found Francis' reflection on faith and family especially the relationship between faith and the common good. For Christians, "the ecclesiology of the encyclical is not that of a servant church (or, as Pope Francis has described it, a church in the street where accidents happen), but of a church that guards the faith against error. The faithful would have benefitted here from some revision on Francis' part in keeping with his homiletic teaching on the church's vulnerable engagement in the world." (Ibid.) Aldo Marcelo Cáceres also mentions that Chapter 4 is the main contribution of Pope Francis to the encyclical. Cáceres analyses the encyclical of Francis through three major keys: Faith, Memory and Common good. Concerning the notion of Common good, Cáceres acknowledges that chapter 4 is the summary of some of the major social questions that the cardinal has always been concerned about. (Aldo Marcelo Cáceres, "Tres claves para comprender el pensamiento del Papa Francisco en *Lumen Fidei*" in *Moralia*, 37 (2014), 47.)

<sup>449</sup> The quotation is translated from the original Spanish version which is: "Bajo el título. Dios prepara una ciudad para ellos, nos encontramos con una buena condensación de algunas de las principales cuestiones sociales que al cardenal siempre le han preocupado. En primer lugar, nos encontramos con una de sus constantes invitaciones: Reconocer la riqueza de nuestra dimensión social y aquello a lo que ella nos compromete. Insiste en que capturemos su sentido profundo para poder desplegarla en la vida de la comunidad. Porque es nuestra naturaleza social la que nos convoca a edificar una buena convivencia; por ella somos citados y obligados a entregarnos para el bien común." (Ibid.)

enlighten the truth and, if the truth is the truth of love, it becomes part of the common good because it helps people to overcome individualism (LF 34).

Talking about the relationship between faith and the common good, Francis argues that the light of faith should be at the service of justice, law and peace. How can people understand that faith contributes to the common good? Pope Francis answers that the light of faith enhances the richness of human relations so that it might endure and be trustworthy. Faith helps people to appreciate the architecture of human relationships, grasps its foundation and sheds light on the art of building, it becomes a service for the common good (LF 51).

Furthermore, Family is the place where faith is absorbed and deepened. When this is done, faith becomes a light capable of illuminating all our relationships in society, setting people on the path of brotherhood. For the Holy Father, the history of faith has been from the very beginning a history of brotherhood. Faith brought many benefits to the city of men for their common life and it is through faith that people come to understand the unique dignity of each person (LF 54). On the other hand, faith “enables people to respect nature more, and to discern in it a grammar written by the hand of God and a dwelling place entrusted to our protection and care.”<sup>450</sup> It helps to create models of development, which are based on creation as a gift for humanity. Faith enlightens life and society (LF 55).

History shows that the faith has helped people to work closely with the poor. Some became mediators of light such as Saint Francis of Assisi or Saint Mother Teresa of Calcutta. The former worked closely with the lepers and the latter shared the suffering of

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<sup>450</sup> This quotation refers explicitly to Ecology. Pope Francis would publish two years later after *Lumen Fidei* another Encyclical Letter on Care for Our Common Home. The option for the poor will be studied in this document in this section. For further study on the question, there is a book entitled *Les Papes et l'Ecologie: De Vatican II à Laudato Si'*. In this book, the Dominican Thomas Michelet presents the social teaching of the Church on Ecology from *Gaudium et Spes* to *Laudato Si'*.

the poor. Even though faith cannot eliminate suffering, it helped Saint Francis of Assisi and Saint Mother Teresa of Calcutta to draw near to the suffering of others. For Francis, “Suffering reminds us that faith’s service to the common good is always one of hope – a hope, which looks ever ahead in the knowledge that only from God, from the future, which comes from the risen Jesus, can our society find solid and lasting foundations”<sup>451</sup> (LF 57). This quotation by Francis reminds us of the opening words of *Gaudium et Spes*, which states that “The joys and the hopes, the griefs and the anxieties of the men of this age, especially those who are poor or in any way afflicted, these are the joys and hopes, the griefs and anxieties of the followers of Christ.” (GS 1)

In his Apostolic Exhortation *EG*, the Holy Father continues his plea for the Church to resist doctrinal rigidity and immobilism at the level of theological formulation or expression.<sup>452</sup> Echeverria notes that Pope Francis expresses himself in a more balanced way in *EG* 40:

The Church is herself a missionary disciple; she needs to grow in her interpretation of the revealed word and in her understanding of truth. It is the task of exegetes and theologians to help “the judgment of the Church to mature”.<sup>[42]</sup> The other sciences also help to accomplish this, each in its own way. With reference to the social sciences, for example, John Paul II said that the Church values their research, which helps her “to derive concrete indications helpful for her magisterial mission”. <sup>[43]</sup> Within the Church countless issues are being studied and reflected upon with great freedom. Differing currents of thought in philosophy, theology and pastoral practice, if open to being reconciled by the Spirit in respect and love, can enable the Church to grow, since all of them help to express more clearly the immense

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<sup>451</sup> Reinhard Hütter sees in this number the hand of Pope Francis but the encyclical should be read from the perspective of the emeritus pope Benedict XVI and Pope Francis. He states:

“It is not at all unlikely that §57 is one of the sections Pope Francis added. (...) The pope emeritus “gives up” his last encyclical letter, his theological patrimony, to his successor, and Pope Francis returns the encyclical to his predecessor by publicly giving credit to him. In a world suffused by celebrity worship and narcissistic self-referentiality, Benedict XVI and Francis point out that the Catholic Church is not theirs but Christ’s and that they both together are claimed by and stand in service of the truth of the one faith, and that their teaching is informed by the self-same light of faith.” (Reinhard Hütter, “Enlightenment: Reflections on Pope Francis’ Encyclical Letter *Lumen Fidei*” in *Nova et Vetera*, English Edition, Vol. 12, No. 1 (2014), 3.) For further analysis of the encyclical there are comprehensive articles such as Daniel J. Stollenwerk, “A New Synthesis of Faith and Reason: Ecumenism in Light of *Lumen Fidei*,” in *The Australasian Catholic Record*, Vol. 92, No. 1, Jan 2015: 53-66. There is another analysis of the encyclical by the Jesuit Christopher Collins, “Talking About God ‘*Lumen Fidei*,’ a new invitation to faith,” in *America*, Dec 2, 2013, 25-26 and available at [www.americamagazine.org](http://www.americamagazine.org) (accessed 05/07/2017).

<sup>452</sup> Eduardo J. Echeverria, *Pope Francis*, 39.



riches of God's word. For those who long for a monolithic body of doctrine guarded by all and leaving no room for nuance, this might appear as undesirable and leading to confusion. But in fact, such variety serves to bring out and develop different facets of the inexhaustible riches of the Gospel (EG 40).

Echeverria remarks that "Pope Francis does not hold the truth itself to be variable with time and place, but only the formulations, namely, "the forms for expressing truth...in order to develop and deepen the Church's teaching."<sup>453</sup> Echeverria also refers to EG 45 where Pope Francis recalls that the task of evangelization "seeks to communicate more effectively the truth of the Gospel in a specific context, without renouncing the truth, the goodness and the light, which it can bring whenever perfection is not possible." Echeverria equally draws the attention of the readers of Pope Francis about Francis' reference to the opening speech of John XXIII at Vatican II in *Gaudet Mater Ecclesia* where Pope John XXIII makes a distinction between truths and its formulations: "For the deposit of faith, the truths contained in our sacred teaching, are one thing; the mode in which they are expressed, but with the same meaning and the same judgment [eodem sensu eademque sententia], is another thing."<sup>454</sup>

In an interview with a French sociologist Dominique Wolton, Pope Francis expresses his understanding of the concept of tradition. When asked about his understanding of the word 'tradition', Pope Francis answers that tradition evolves and it's always on the way. Quoting a statement of a French theologian and monk Vincent de Lérins, Pope Francis states that tradition is on the move.<sup>455</sup> For him, tradition grows through dialogue. This is true when people dialogue and listen to the opinion of each

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<sup>453</sup> Ibid.

<sup>454</sup> Ibid., 41. See EG 41.

<sup>455</sup> The quotation from the interview is: " "La tradition est en mouvement"(...) Il dit cela, en latin: "Ut annis scilicet consolidetur, dilatetur tempore, sublimetur aetate » la tradition avance, mais selon quelles modalités ? De façon à ce qu'elle grandisse avec le temps et soit sublimée avec l'âge. Les critères de la tradition ne changent pas, l'essentiel ne change pas, mais elle grandit, elle évolue." (Dominique Wolton, *Politique et société* (Paris : l'Observatoire, 2017), 316. Pope Francis refers here to the book *Commonitorium (Tradition et Progrès)* known as *Peregrinus*, trad. P. de Labriolle, éditions Migne, 1978.

other, tradition can grow in that context. It is called the ‘hermeneutic of continuity’.<sup>456</sup>

Echeverria sees in Pope Francis’ understanding the project to carry on Saint Vincent de Lérins’ vision stated with John XXIII and it also appears in his Encyclical Letter, *Laudato Si’* when he asserts that

We need to develop a new synthesis capable of overcoming the false arguments of recent centuries. Christianity, in fidelity to its own identity and the rich deposit of truth which it has received from Jesus Christ, continues to reflect on these issues in fruitful dialogue with changing historical situations. In doing so, it reveals its eternal newness. [98] (LS 121)

Echeverria concludes that Pope Francis is a man of the Council who, along the same line as John XXIII, “framed the question regarding the nature of doctrinal continuity in light of the Lérinian principle (...) that doctrine must progress according to the same meaning and the same judgement (...) allowing for legitimate pluralism and authentic diversity within a fundamental unity of truth.”<sup>457</sup> Nevertheless, the German Jesuit and theologian Christoph Theobald asserts that under Francis’ papacy, the classical expression ‘Social Teaching of the Church’ or ‘Magisterial Teaching of the Church’ has shifted. He notes that Pope Francis puts the emphasis not only on the human reality but also on the human heart. His style of talking to the people appears in his writings such as *Evangelii Gaudium* (EG) and *Laudato Si’* (LS). For example, Theobald refers to the recipients of EG and LS. In EG 3, Pope Francis speaks to each Christian where ever he or she is in the world and in LS 3, the Holy Father speaks to every human being living in the planet.<sup>458</sup> This could also be understood in the framework of the Theology of the People.

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<sup>456</sup> Wolton, 318-319.

<sup>457</sup> Echeverria, 43.

<sup>458</sup> He states : “Je fais l’hypothèse que, sous la plume de François, l’expression Classique “enseignement social de l’Eglise” ou “Magistère social de l’Eglise » change de signification. S’adressant in *Evangelii Gaudium* a « chaque chrétien, en quelque lieu ou situation où il se trouve » (EG 3), et in *Laudato si’* « à chaque personne qui habite cette planète » (LS 3), le pape adopte un style inédit : il prête attention à l’expérience concrète des croyants et des humains que nous sommes ; il ne fait pas seulement appel à notre intelligence, mais aussi à notre affectivité, à nos sens et à notre cœur (...) grâce au style de ses textes, si proche de sa manière de s’adresser oralement a ses interlocuteurs, il nous fait faire un véritable parcours «

### 4.3.2 Pope Francis and the Theology of The People

In an article entitled “Pope Francis and the theology of the people”, the Argentine Jesuit theologian Juan Carlos Scannone outlines some of the influences of the theology of the people on Pope Francis. For him,

The influence of the Argentine school on Pope Francis is especially evident in his Apostolic Exhortation *Evangelii Gaudium*. Moreover, the theology of the people also provides an elucidating point of departure for interpreting the gestures and tonalities of Pope Francis’ ongoing call for a Church that is poor and for the poor.<sup>459</sup>

Describing the origin and the development of the theology of the people, Scannone refers to two founding fathers who are also Argentine theologians: Fathers Lucio Gera and Rafael Tello. Both helped to form and disseminate the movement. That is why another Argentine theologian and Jesuit notes that Gera and Tello “are arguably among the most significant Argentine theologians of this period and contributed more than any others to the theological landscape of Jorge Mario Bergoglio.”<sup>460</sup> In other words, Gera Lucio contributed to the genesis of the Argentine version of Post-Medellin theology that strongly influenced Bergoglio.<sup>461</sup>

Gera like Jorge Bergoglio had an Italian background. He worked in Argentina as a priest, teacher and theological writer. Deck summarizes what he has accomplished in

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spirituel », un parcours de conversion.” (Christoph Theobald, “L’enseignement social de l’Eglise selon le Pape François,” in *La pensée sociale du pape François* (Paris : Jésuites, 2016), 11.

<sup>459</sup> Juan Carlos Scannone, “Pope Francis and the theology of the people” in *Theological Studies*, Vol. 77 (1), 2016, 118. It should be recalled here that the expression ‘Church that is poor and for the poor’ goes back to Pope John XXIII and the Second Vatican Council. The first chapter of this research studied it. Alongside Gera and Tello, Juan Carlos Scannone is another outstanding philosopher and theologian who influenced Bergoglio. He is a few years older than Bergoglio, but he was one of his teachers. The Jesuit Allan Figueroa Deck writes that Juan Luis Scannone “along with Carlos Maria Galli, who wrote a dissertation at the Catholic University of Argentina on Lucio Gera, are probably the most knowledgeable scholars regarding the intellectual and pastoral formation of Bergoglio within the rich, dramatic, theological environment of the times.” (Allan Figueroa Deck, Francis, Bishop of Rome: The Gospel for the Third Millennium (New York: Paulist Press, 2016), 36.) According to Rafael Luciani, the people are not a metaphysical term or a mass of individuals. He defines the understanding of the people as follows: “the people as subject of history is not something already given, finished, something that becomes present at a particular moment, but rather a process, a reality in motion.” (Rafael Luciani, *Pope Francis and the Theology of the People* (Trans. Phillip Berryman; Maryknoll, NY: Orbis, 2017), 9.)

<sup>460</sup> *Ibid.*, 35.

<sup>461</sup> Ivereigh, 95.

three words: realism, humanity, and pilgrimage.<sup>462</sup> For him, these words “echo strongly today in Pope Francis’ Gospel-inspired vision of the Church.”<sup>463</sup> Deck adds that “Cardinal Bergoglio thought so highly of Gera that, on his death in 2012, he insisted that Gera be buried in the crypt of the archbishops of Buenos Aires.”<sup>464</sup> Concerning his life, Figueroa describes him as a systematic theologian who played a key role in both Latin America and Argentina. Gera was a consultant and writer for the General Conferences of Medellin and Puebla, he participated in the creation of the San Miguel Conference of Argentine Bishops in 1969 and the same year, he was appointed to the International Theological Commission by Pope Paul VI. Figueroa also describes Gera’s theological point of view about popular piety as follows:

He (Gera) linked popular piety to the ancient doctrine of the *sensus fidei*, which affirms the presence of the Holy Spirit in the faithful intuitions of all the baptized. These distinctive emphases capture the nature of the difference between liberation theologians, who viewed popular piety with scepticism as alienating and, as Marx contended, the ‘opium of the people,’ and others like Gera and his Argentine school of thought, which hailed the faith of the people as the desired product of the encounter of the Gospel with the culture of real, ordinary people.<sup>465</sup>

Father Gera as well as the theology of the people rejected both the method of socioeconomic analysis emerging from Marxism and the analyses of Enlightenment culture of western Europe. He saw them as a threat to the integrity of the faith of the Latin American peoples. Gera’s theological thought put the emphasis on the role of popular culture “as locus of meaning for the way of thinking, feeling, and being of an entire people.”<sup>466</sup>

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<sup>462</sup> Those three words are explained by Deck through the quotation of the theologian Virginia Azcuy. He summarizes Gera Lucio’s vast works in the following terms: “Without exaggerating one can say that his history reveals and speaks about the realism of God’s coming into this world in the flesh, and of the gift that the Church is for humanity, and of the absolute destiny that unfolds in the pilgrimage of peoples and their cultures.” (Figueroa Deck, *Francis, Bishop of Rome*, 37.)

<sup>463</sup> *Ibid.*

<sup>464</sup> *Ibid.*

<sup>465</sup> *Ibid.*, 39.

<sup>466</sup> *Ibid.*, 40.

Talking about the second outstanding theological figure and founding father of the theology of the people Deck writes: “In the prologue to Enrique Ciro Bianchi’s study of the thought of Rafael Tello Cardinal Bergoglio refers to the great master, Tello, as ‘a theologian and pastor taken up by the love of God, of the Virgin Mary and of his people.’”<sup>467</sup> For Deck, Tello has influenced the development of popular devotion in Argentina in the past four decades. He contributed notably to the change of focus at both sanctuaries of San Cayetano de Liniers and Nuestra Senora de Luján.<sup>468</sup> This change comes from the fact that he integrated the socio-political with devotional concerns. It implies the use of the phenomena of the sanctuaries as “compelling response to the reality of poverty and injustice—and explicitly nonviolent and a non-Marxist one.”<sup>469</sup>

Scannone also explains the influences of both Gera and Tello on Pope Francis by two key factors: the first is that there was an indirect link between the inner-city where Cardinal Bergoglio ministered and the theology of the people. In Scannone’s own words: “This connection is confirmed if we remember that when Gera died in 2012 he was buried in the Cathedral of Buenos Aires.”<sup>470</sup> The second key factor is explained by the fact that Cardinal Bergoglio presented to the public in 2012 a book written by Father Enrique Bianchi, a disciple of Tello who is one of the founding fathers of the theology of the

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<sup>467</sup> Ibid., 44. Concerning his life, “Tello was born in the city of La Plata just south of Buenos Aires in 1917. His family had land in the extreme north-western Argentine province of Jujuy, where he spent many vacations and family visits as a youth. (...) At the age of twenty-seven Tello became a lawyer. At this time, he was active in Catholic Action and Young Christian Workers in his parish and among university students whom he served as an adviser. He entered the seminary in 1945 and was ordained five years later. In 1958, he became a professor of theology at the Theological Faculty of Buenos Aires. From 1966 to 1973, he was a consultant for COEPAL.” (Ibid., 45)

<sup>468</sup> Rosales and Olivera describe the Lujan Virgin as an icon made in 1630 as “one of many representations by which the Virgin Mary is venerated. Sanctified by Pope Pius XI, October 29, 1893, Father Federico Grote, founder of the Catholic Worker’s Circle, was the first to organize a pilgrimage to her sanctuary at Lujan, a city located on the outskirts of Buenos Aires.” (Luis Rosales, Daniel Olivera, eds. *Francis: A Pope for Our Time: The Definitive Biography* (USA: Humanix book, 2013), 65.) Cayetano is the name of the saint. He is not from Argentina but from Venice and lived in Naples during the Renaissance. He is considered as the patron saint of the unemployed and “to Argentines he’s a santo porteño (a Buenos Aires saint), who left his eternal imprint particularly in Liniers, a working-class and commercial neighbourhood in Buenos Aires.” (Ibid.)

<sup>469</sup> Ibid., 48.

<sup>470</sup> Ibid., 119.

people.<sup>471</sup> In an interview with Scannone, the French journalist Bernadette Sauvaget argues that since Pope Francis is from South America, consequently his theological thinking is influenced by the theology of Latin-America. According to Scannone, Pope Francis' theological thought is deeply influenced by the theology of the People. Pope Francis belongs to the theological school of Buenos Aires.<sup>472</sup>

In his book entitled *Francis of Rome and Francis of Assisi: A New Springtime for the Church*, Leonardo Boff studies the connection of Pope Francis to the theology of people and Liberation theology. For Boff, to ask whether Francis belongs to the current of Liberation theology does not make sense because Pope Francis cherishes the causes of Liberation theology such as: the struggle for the liberation of the poor, and the oppressed from extreme poverty. For him, "Pope Francis has lived Liberation theology among us.

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<sup>471</sup> Ibid. The book is entitled *La teología de la pastoral popular de Rafael Tello: Para entender las raíces teológicas del Papa Francisco* by Enrique Ciro Bianchi. Scannone describes widely the context and the emergence of the theology of the people. He places its origin in 1966 with the creation of the Episcopal Commission for Pastoral Practice (COEPAL) with the ambitions of initiating a national pastoral plan. So, the commission was made up of bishops, pastoral agents and theologians including Gera and Tello. It is in this environment that the theology of the people was born. Scannone states: "The reflections of Gera and COEPAL mainly dealt with the notion of the 'people of God' from Vatican II and its interrelationship with various peoples, especially the people of Argentina. It is worth noting that one of the expressions characteristics of Bergoglio is 'faithful people,' a people whose faith and popular piety he values with great vigor." (Ibid., 120) Why did the COEPAL use the notion of 'theology of the people'? For Scannone the members of the COEPAL did not want to use the categories of liberal sociology and Marxist sociology to explain the theology of the people. They preferred to refer to the history and culture of Latin Americans. In the process of their reflection they found relevant the term 'people'. For Scannone, the term 'people' had a strong tradition in Latin America, for example during the Mexican revolution, and also before the reign of Perón. From the theological perspective, Vatican II put the emphasis on the notion 'people of God.' (Sauvaget, *Le Pape du Peuple*, 50) Concerning the notion 'people', Scannone underlines its complexity. The term is ambiguous because it relates to the historical circumstances. Gera, one of the founding fathers of the theology of the people defines the term 'people' by relating it to culture, but a culture rooted in the common history of the people of Latin America. The word 'people' does not mean only sharing the same culture or lifestyle but also means sharing the same social and political project, a project for the common good. (Ibid., 52)

<sup>472</sup> Bernadette Sauvaget, Juan Carlos Scannone : *Le Pape du peuple, Bergoglio raconté par son confrère théologien jésuite et argentin* (Paris : Cerf, 2015), 46. Keith Lemna highlights some characteristics of the *teología del pueblo* such as : reference to *Evangelii Gaudium* (hereafter EG), *Evangelii Nuntiandi* (hereafter EN) and asserts that human liberation relates to the Gospel Message of Salvation instead of Marxist liberation. Liberation is firstly understood as liberation from sin (EN 35-39). The theology of the people also rejects the Marxist category of conflict. Both oppressed and oppressors need conversion. So, the concept of people also includes hierarchical Church which is also invited to be servant. The theology of the people also emphasizes the preferential option for the poor and gives primacy to 'popular religiosity' (Keith Lemna, "Three Pathways into the Theological Mind of Pope Francis," 34.) Concerning the popular religiosity, Lemna quotes: EN 48; EG 90; 122-26.

That is a way of doing theology more than that found at any school.”<sup>473</sup> In this perspective, Pope Francis is fulfilling the intention of Liberation theology irrespective of not using the expression itself. Nevertheless, Boff acknowledges that in Argentina an alternative to Liberation theology has been developed as “a typical expression of the local culture: a theology of the people or theology of popular culture.”<sup>474</sup> Boff defines the Argentine theological school as the “theology of the people who prefer to analyse popular culture in its dynamism and its contradictions, stressing the elements of participation and liberation that are present in it.”<sup>475</sup> Boff’s understanding of the theology of the people can be easily combined with Scannone’s definition of this theology because there is no opposition between the two. For Scannone,

Though TP (theology of the people) does not take class struggle as a ‘decisive hermeneutic principle for understanding society and history’. It concedes a historic place to conflict – even class conflict – conceiving of it on the basis of the prior unity of the people. Thus, institutional and structural injustice is understood as a betrayal of this unity by one part of the whole and thus becomes a force opposed to the people (antipueblo).<sup>476</sup>

According to Boff, both theologies (Liberation theology and the theology of the people) should not be opposed as “the two tendencies complement each other in the service of a very important cause: the difficult service, demanding sacrifice, and sometimes even martyrdom of supporting the poor in their struggles and strengthening their desire for liberation.”<sup>477</sup> But for Scannone, the theology of the people is a current

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<sup>473</sup> Leonardo Boff, *Francis of Rome and Francis of Assisi: A New Springtime for Church* (Maryknoll, NY: Orbis books, 2014), 77.

<sup>474</sup> *Ibid.*, 78.

<sup>475</sup> *Ibid.*

<sup>476</sup> *Ibid.*, 122. In a critical analysis of Juan Carlos Scannone's book, *La teología del Pueblo*, José Ignacio González summarizes the difference between the theology of liberation and theology of the people in the following way: “Así, la teología del pueblo aparecía como más cultural y más espiritual (menos conflictiva también) y la teología de la liberación como más social y más política (pero más conflictiva). La primera parecía tener más contacto con la realidad de los pobres y la otra más con el estudio de las ciencias sociales.” (José Ignacio González Faus, “La teología del papa Francisco,” in *Revista Latinoamericana de Teología*, Vol. 102, (Septiembre-Diciembre, 2017), 311.)

<sup>477</sup> *Ibid.*

within Latin American Liberation theology. He enumerates the characteristics of its methodology as follows:

(1) use of historical-cultural analysis (el análisis histórico-cultural), privileging it over structural social analysis (el análisis socio-cultural) without discarding the latter; (2) employment of more synthetic and hermeneutical sciences such as history, culture, and religion (as complements to more analytical and structural sciences) as a form of mediation to get to know reality and to transform it; (3) rooting of such scientific mediations in a sapiential knowledge and discernment for the sake of the 'affective connaturality that love gives' (EG 125), which, in turn, confirms their scientific character; and (4) taking a critical distance from the Marxist method of social analysis and its categories of understanding and practical strategies.<sup>478</sup>

In another article, Bishop Jean-Luc Brunin, President of the Council for family of the Bishop's Conference of France, also underlines the fact that Pope Francis cares particularly for the people of God, the faith of the humble and the notion of *sensus fidei*.<sup>479</sup> For him, Pope Francis is close to the theology of the people, which intends to allow the Good News to transform a people's culture.<sup>480</sup> To explain this connection of Pope Francis to the theology of the people, the Jesuit Thomas Rausch remarks that Pope Francis puts the emphasis on feeling when he speaks about faith. For him, faith is ruled by sentiments of heart and expressed in thoughtful gestures towards God and our brothers and sisters. Rausch notes that Francis appeals to John of the Cross, Teresa of Avila and Ignatius of

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<sup>478</sup> Ibid., 124. Referring to the document of Aparecida (EV 124), Pope Francis invites us to welcome the riches which the Holy Spirit pours forth in popular piety with the spirit of God the Good shepherd. We read: "To understand this reality we need to approach it with the gaze of the Good Shepherd, who seeks not to judge but to love. Only from the affective connaturality born of love can we appreciate the theological life present in the piety of Christian peoples, especially among their poor. I think of the steadfast faith of those mothers tending their sick children who, though perhaps barely familiar with the articles of the creed, cling to a rosary; or of all the hope poured into a candle lighted in a humble home with a prayer for help from Mary, or in the gaze of tender love directed to Christ crucified. No one who loves God's holy people will view these actions as the expression of a purely human search for the divine. They are the manifestation of a theological life nourished by the working of the Holy Spirit who has been poured into our hearts (cf. Rom 5:5)." (EV 125)

<sup>479</sup> Jean-Luc Brunin, "La pensée sociale du Pape François" in *La pensée sociale du Pape François*; Bertrand Heriard Dubreuil (Paris: Jésuites, 2016), 49. Francis' love for the faith of the people is reported by Austin Ivereigh when he participated in a Pentecost Vigil marking the 50th anniversary of the Catholic charismatic renewal at the Circus Maximus in Rome. Ivereigh exclaimed: "Even a few years ago, we could never have imagined that this was possible!" (Austin Ivereigh, "Pentecost Pope affirms charismatic renewal as 'current of grace'" in *The Irish Catholic*, June 8, 2017, 21.)

<sup>480</sup> Ibid.



Loyola to describe the relationship between faith and feeling.<sup>481</sup> For Rausch, Francis is a complex thinker, allergic to ideologies, and “what he wants is a concrete theological language that brings others to the gospel and to Christ. Such language is of necessity multicultural.”<sup>482</sup>

Quoting *Evangelii Gaudium* 118, Rausch also notes that traditional piety is considered by Francis a form of theology and is rooted in humanity’s openness to the transcendent. It helps those who are ‘far from home in a secular city to feel at home’.<sup>483</sup> Scannone explained this connection between Pope Francis and popular piety by referring to the documents of Puebla and Aparecida, which gave an important place to ‘popular wisdom’ and were able “to discern within Latin American popular piety moments of genuine spirituality and the mysticism of the people.”<sup>484</sup> Scannone examines in depth the interconnection between the pastoral focus of Pope Francis and the theology of the people in his Apostolic Exhortation *Evangelii Gaudium*, which he considers as a ‘roadmap’ of his pontificate.<sup>485</sup> He analyses this relationship in three points: Pope Francis’ understanding of the faithful people; the four priorities of Pope Francis in building and leading the people; and popular piety. These three points are intrinsically linked to Francis’ understanding of the ‘sense of faith’ of the people of God. Pope Francis’ understanding of the *sensus fidei* and his relationship to popular piety will be analysed in one of the sections of this chapter. This section will analyse the four priorities of Pope Francis, which are necessary to understand his theological thinking. These four priorities are: Time is greater than space (EG 222-225), Priority of unity over conflict (EG 226-

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<sup>481</sup> Thomas P. Rausch and Richard R. Gaillardetz, ed., *Go into the street! The welcoming Church of Pope Francis* (New York: Paulist Press, 2016), 2.

<sup>482</sup> *Ibid.*

<sup>483</sup> *Ibid.* Also see EG 122-126 where Pope Francis describes the popular piety.

<sup>484</sup> Scannone, “Pope Francis and the Theology of the People,” 123. This mysticism of the people is also called the spirituality of the people or *Mística popular* in reference to the Aparecida Document, 262.

<sup>485</sup> *Ibid.*, 126.

230), Realities are more important than ideas (EG 231-233) and Superiority of the Whole over the Parts (EG 234-237).<sup>486</sup> Those principles are at the centre of chapter four of *Evangelii Gaudium* on the Social dimension of the Gospel.

#### ***4.3.2.1 Time is greater than Space (EG 222-225)***

Scannone invites Pope Francis' reader to understand this principle in the framework of the Ignatian spirituality and especially relating to the discernment of the spirits.<sup>487</sup> He states:

EG begins asserting the priority of time over space. In fact, this means that starting “processes that build up a people” in history is more important than occupying positions (espacios) of power and/or possession (e.g., land or wealth) (EG 223, 224). The spiritual sense of the proper time for the right decision, whether it be existential, interpersonal, pastoral, social, or political, is part of the Ignatian charism and is closely connected with the discernment of spirits.<sup>488</sup>

Thomas Rourke confirms Scannone's comments, asserting that Pope Francis' vision for the Catholic Church should be understood in the tension derived from the Ignatian Vision.<sup>489</sup> He is also well known for “his geopolitical analysis and his Christian interpretation of the current signs of the times and of the Latin American Church as a mature source of ecclesial reflection.”<sup>490</sup> Commenting on this principle Rourke also avers

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<sup>486</sup> Ibid., 127-130.

<sup>487</sup> It refers here to the rules of Saint Ignatius of Loyola, founder of the Jesuits which is a “set of directives for discernment of spirits.” (Jules J. Toner, *A Commentary on Saint Ignatius' Rules for the Discernment of Spirits* (Missouri: The Institute of Jesuit Sources, 1982), xvi. Another Jesuit Pierre Jacob explains the discernment of the spirits as follows: “How can one be sure that he follows the call of God and not his own desires? Over years of searching reflection on his own experience of God's direct action and also by learning from his own mistakes, Ignatius gradually evolved what he later called “Rules for the Discernment of Spirits. By ‘Spirits’ he meant the movements (Spanish “mociones”), impulses, inclinations that take place in any person who seriously tries to follow God's call.” (Pierre Jacob, *Ignatian Discernment: A commentary of the Rules of Discernment and the Autobiography of Ignatius of Loyola* (India: X. Diaz del Rio, 2001), XIII.)

<sup>488</sup> Ibid., 128.

<sup>489</sup> Thomas R. Rourke, *The Roots of Pope Francis' social and political thought: From Argentina to the Vatican* (Maryland: Rowman & Littlefield, 2016), 90. One should also understand Pope Francis' principle in relationship to Pope Francis' long-time friend, Alberto Methol Ferré. An Uruguyan and philosopher, “a brilliant autodidact who had long participated in the Conference of Latin American Bishops,” (Ibid., 85.) He is also well known for “his geopolitical analysis and his Christian interpretation of the current signs of the times and of the Latin American Church as a mature source of ecclesial reflection. (Ibid.)

<sup>489</sup> Ibid.

<sup>490</sup> Ibid.

that “Time is greater than space” refers to a long-term perspective that must prevail over the search for immediate results. Pope Francis invites us “to think in terms of initiating healthy processes and projects for the long run (EG, 222-25).”<sup>491</sup>

#### ***4.3.2.2 Priority of Unity over Conflict (EG 226-230)***

For Rourke, this principle should be understood in Pope Francis ‘view of the Church, which is

no one within which there is no conflict. This principle should also be understood in the context of Ignatian vision because “in this world there are irreducible antinomies and inevitable tensions: (1) universality versus particularity, (2) the traditional versus the new, (3) unity versus multiplicity, (4) interiority versus the apostolate.”<sup>492</sup>

For Scannone, the principle should be understood in relationship to the Theology of the People because this theology “considered plural unity and conflict from the side of unity but also recognized the reality of the “anti-people” of conflict and of the struggle for justice.”<sup>493</sup> Pope Francis invites us to face conflicts and not to avoid them because “it is the willingness to face conflict head on, to resolve it and to make it a link in the chain of a new process. Blessed are the peacemakers! (Mt 5:9).” (EG 227) And rightfully so for

Whether we are thinking in terms of the Catholic Church or broader civil society, we must recall our common filiation in God. Without ignoring the reality of conflict, and its healthy aspects, perpetual divisiveness in the Church or civil society is ultimately destructive. One must be willing to see the truth in the other. Diversities can be harmonized where there is goodwill and openness to unifying action of the Holy Spirit (EG, 226-30).”<sup>494</sup>

#### ***4.3.2.3 Realities are more important than Ideas (EG 231-233)***

Pope Francis explains explicitly the meaning of this principle. He asserts:

Realities are greater than ideas. This principle has to do with incarnation of the word and its being put into practice: ‘By this you know the Spirit of God: every spirit that confess that Jesus Christ is come in the flesh is from

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<sup>491</sup> Rourke, 94.

<sup>492</sup> Ibid., 90.

<sup>493</sup> Scannone, 129.

<sup>494</sup> Rourke, 94.

God' (1Jn 4:2). The principle of reality of a word already made flesh and constantly striving to take flesh anew, is essential to evangelisation. It helps us to see that the Church's history is a history of salvation, to be mindful of those saints who inculturated the Gospel in the life of our peoples and to reap the fruits of the Church's rich bimillennial tradition, without pretending to come up with a system of thought detached from this treasury, as if we wanted to reinvent the Gospel (EG 233).

Finally, for the Holy Father, the principle invites Christians to put the Good News into practice and to be committed to justice and charity. This is only possible if we see in Christ the fullness of reality.<sup>495</sup>

#### ***4.3.2.4 Superiority of the Whole over the Parts (EG 234-237)***

Here again Scannone invites the readers of Pope Francis to understand the principle in relation to the theology of the People. He justifies it by the fact that Pope Francis' connects this principle with the tension between globalization and localization in EG 234. This tension in Pope Francis' principle "converges with the historical and cultural roots of TP (Theology of the People)."<sup>496</sup> Referring to this convergence, Pope Francis states: "It is the convergence of peoples who, within the universal order, maintain their own individuality; it is the sum of persons within a society, which pursues the common good, which truly has a place for everyone." (EG 236) For Scannone, "without using the word, the Pope points to interculturality", which is central to the Theology of the People.<sup>497</sup> Rourke interprets the principle in the ecclesiological perspective as he views the relationship of the local church to the universal Church. For him, "overemphasis on the part undermines the integrity of the whole, as when, for instance, local church movements begin to pull away from the universal Church (EG, 234-37)."<sup>498</sup>

In sum, Francis' four principles are rooted in the theological school of Argentina. This same school also puts the emphasis on the sense of the faithful. Francis' love for the

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<sup>495</sup> Ibid.

<sup>496</sup> Scannone, 130.

<sup>497</sup> Ibid.

<sup>498</sup> Rourke, 95.

faithful should be situated in this context as the notion of *sensus fidei* is deeply rooted in the theology of the people, which promotes the faith of the simple people of God cherished by Pope Francis.<sup>499</sup> The next section will study the interconnection between Francis' understanding of the people of God and the notion of *sensus fidei*.

### 4.3.3 Pope Francis, and the Theology of *Sensus Fidei*

The previous section studied the relationship between Pope Francis and the theology of the people. It emerged that this theological school of Argentina influenced Pope Francis' theological thought. This is noticeable by the fact that he mentions, regularly, in his writings, especially *Evangelii Gaudium* the faith of the humble and the notion of *sensus fidei*.<sup>500</sup> Even though the notion of *sensus fidei* was stressed by Vatican II (LG 12), since the election of Pope Francis it has come into the spotlight not only with the publication of his Apostolic Exhortation *Evangelii Gaudium* but also with the publication of a document on the notion of *sensus fidei* in the Church by the International Theological Commission (hereafter as "ITC").<sup>501</sup> This present section brings to the fore the

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<sup>499</sup> Also see Enrique Ciro Bianchi, *La teología de la pastoral popular de Rafael Tello: Para entender las raíces teológicas del Papa Francisco* (Buenos Aires: Kindle Amazon, 2016).

<sup>500</sup> Brunin, "La pensée sociale du Pape François," 49.

<sup>501</sup> Christoph Theobald, "Sens de la foi, sens des fideles" in *Recherches des sciences religieuses*, 104/2, 161. See also International Theological Commission, *Sensus Fidei in the Life of the Church* (London: Catholic Truth Society, 2014). The first chapter of the document describes the *sensus fidei* in Scripture and Tradition. In the introduction, the International Theological Commission (hereafter ITC) puts the emphasis on the gift of the Holy Spirit which is given to every baptised person to participate in the prophetic office of Jesus Christ. This gift allows all the faithful ones to bear witness to the Gospel as the Holy Spirit has anointed them and equipped them for this mission. Because of the power of the Holy Spirit, the faithful have an instinct for the truth of the gospel, it enables them to recognize authentic Christian doctrine but also to reject what is false. It is this supernatural instinct which is linked with faith that is called *sensus fidei* (no 1-2.) From the theological perspective, the notion refers to two distinct realities but interconnected: firstly, the capacity of the personal faith of the believer within the Church to discern the truth of faith and secondly "the communal and ecclesial reality herself, by which she recognizes her Lord and proclaims his word." (no 3) Both dimensions, called the convergence (consensus) by the ITC, play "a vital role in the Church: the *consensus fidelium*" (Ibid.) So the ITC uses the term '*sensus fidei fidelis* to refer to the personal aptitude of the believer to make an accurate discernment in matters of faith, and *sensus fidei fidelium* to refer to the Church's own instinct of faith. According to the context, *sensus fidei* refers to either the former or the latter, and in the latter case, the term *sensus fidelium* is also used." (Ibid.)

In the last paragraph of the introduction, the ITC acknowledges that "the phrase *sensus fidei* is found neither in the Scriptures nor in the formal teaching of the Church until Vatican II. However, the idea that the Church as a whole is infallible in her belief since she is the body and bride of Christ (cf. 1Cor 12:27; Eph 4: 12; 5:21-32; Rev 21:9), and that all of her members have an anointing that teaches them (cf. John 16:13), is everywhere apparent from the very beginnings of Christianity" (no 7).

understanding of this notion in Pope Francis' theological thought. The purpose is to show that there is an interconnection between the theology of the people that influenced Pope Francis and one of the essential themes of Vatican II, which is the notion of *sensus fidei*. Along the same lines as Vatican II, the ITC Document on *Sensus Fidei in the Life of the Church* acknowledges that the *sensus fidei* is a most important resource for new evangelisation. The ITC Document also refers to Pope Francis who called the *sensus fidei*

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The first section of the document entitled Biblical Teaching (no 8-21) traces the main lines of the notion in Scripture in a double way of understanding the term faith, and also the capacity of believers to discern the true faith. The ITC studies in this first section: Faith as response to the Word of God (no 8-10); the personal and Ecclesial Dimensions of Faith (no 11-12) and finally the capacity of Believers to know and witness the Truth (no 13-21). The ITC also presents the development of the idea in the history of the Church in five steps: the patristic Period; the Medieval Period; the Reformation and Post-Reformation Period; the 19th Century and the 20th Century (no 22-43).

The Belgian theologian Joseph Famerée highlights the origin and the development of the notion of *sensus fidei* in the history of the church by referring to the different stages described by the ITC. Famerée starts from the patristic time. It was called *sensus fidelium* or *consensus fidelium*, which expressed « l'accord de tous les fidèles, de toutes les Eglises, comme critère de la foi apostolique véritable. » (Joseph Fameré, "Sensus Fidei, Sensus fidelium" in *Recherches des sciences religieuses*, 104/2, 168-169) The communion between the people of God and the Church expressed the *sensus fidelium* at the patristic time. It is from the XIII<sup>th</sup> Century that the Scholastics such as Guillaume d'Auxerre, Albert le Grand or Thomas Aquinas started to link the *sensus fidei* to the only faith of the people of God. The theologians of the middle of the XVI<sup>th</sup> century will systematise the notion. Famerée states : " Ce sont les théologiens de la seconde moitié du XVI<sup>e</sup> siècles qui vont systématiser le 'sens des fidèles' ou leur 'consentement', ce qu'ils appellent aussi le *sensus Ecclesiae*." (Ibid., 171). The *sensus fidei* will be considered as one of the theological loci. In the XIX<sup>th</sup> Century the notion of *sensus fidei* was elaborated as a doctrine. The notion will be confirmed in theological tradition at Vatican II in many documents such as LG 12; LG 35; PO 9; GS 52 (Ibid., 174.) Finally, the ITC defines *sensus fidei* as an instinct that the people of God possesses. It states: "The *sensus fidei fidelis* is a sort of spiritual instinct that enables the believer to judge spontaneously whether a particular teaching or practice is or is not in conformity with the Gospel and with apostolic faith. It is intrinsically linked to the virtue of faith itself; it flows from, and is a property of, faith. [62] It is compared to an instinct because it is not primarily the result of rational deliberation, but is rather a form of spontaneous and natural knowledge, a sort of perception (aisthesis).", no 49) Speaking about the *sensus fidelium* in recent theological discussion, Fáinche Ryan declares: "In 2014 the International Theological Commission (ITC) turned their attention to this important issue, in 2015 the Convention of the Catholic Theological Society of America (CTSA) addressed the theological concept, and in 2017 the meeting of the Catholic Theological Association of Great Britain (CTAGB) has the very interesting title, *Sensus Fidelium: Listening for the Echo*." (Fáinche Ryan, "On Consulting the Faithful in Matters of Doctrine: From Newman to the Second Vatican Council and Beyond" in *Studies: An Irish Quarterly Review*, Vol. 106; no 423, Autumn 2017, 350. In addition, there are other publications such as: Charles E. Curren and Lisa A. Fullam (eds.), *The Sensus Fidelium and Moral Theology. Readings in Moral Theology No 18* (New York/Mahwah: Paulist Press, 2017). Bradford E. Hinze and Peter C Phan, *Learning from All the Faithful: A contemporary Theology of the Sensus Fidei* (Eugene, OR: Pickwick, 2016). Richard R. Gaillardetz, *By What Authority: A Primer on Scripture, the Magisterium, and the Sense of the Faithful* (Minnesota: Liturgical Press, 2003). Gerard Mannion, "Making Sense of the Faith: The Dynamics of *Sensus Fidelium* and the Role of Reception" in *Ecclesiology*, Vol.13, 3 (2017), 379-385.

“‘new ways for the journey’ in faith of the whole pilgrim people.”<sup>502</sup> They are also essential for the new evangelisation.<sup>503</sup>

Jean-Francois Chiron in an article on the notion of *sensus fidei* and Pope Francis’ view of the Church remarks that the fact that Pope Francis gives the opportunity to many in the Church, from the bishops to the laity to express their point of view. This shows that he is putting into practise the theology of *sensus fidei* in today’s Church.<sup>504</sup> He mentions number 119 of *Evangelii Gaudium* as evidence of his understanding of the notion of *sensus fidei*. It is written as follows:

In all the baptized, from first to last, the sanctifying power of the Spirit is at work, impelling us to evangelization. The people of God are holy thanks to this anointing, which makes it infallible in *crendo*. This means that it does not err in faith, even though it may not find words to explain that faith. The Spirit guides it in truth and leads it to salvation. [96] As part of his mysterious love for humanity, God furnishes the totality of the faithful with an instinct of faith – *sensus fidei* – which helps them to discern what is truly of God. The presence of the Spirit gives Christians a certain connaturality with divine realities, and a wisdom which enables them to grasp those realities intuitively, even when they lack the wherewithal to give them precise expression (EG 119).

Chiron sees in this passage the classical doctrine of *sensus fidei*. Pope Francis also emphasises the role of the Holy Spirit in the life of the people of God. It is clearly stated that “the presence of the Spirit gives Christians a certain connaturality with divine realities, and a wisdom, which enables them to grasp those realities intuitively, even when they lack the wherewithal to give them precise expression”<sup>505</sup> Pope Francis also

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<sup>502</sup> ITC, *Sensus Fidei in the Life of the Church*, 127. Also see Pope Francis, “Address to clergy, persons,” in *Consecrated Life and Members of Pastoral Councils*, San Rufino, Assisi, 4 October 2013. available at [https://w2.vatican.va/content/francesco/en/speeches/2013/october/documents/papa-francesco\\_20131004\\_clero-assisi.html](https://w2.vatican.va/content/francesco/en/speeches/2013/october/documents/papa-francesco_20131004_clero-assisi.html) (accessed 07/12/2017).

<sup>503</sup> Ibid.

<sup>504</sup> Jean-Francois Chiron, “Sensus Fidei et vision de l’Eglise chez le Pape Francois” in *Recherches des sciences religieuses*, 104/2, 187. Analysing the documents that were circulated to facilitate the consultation before the extraordinary general session of the Synod of Bishops in 2014, Tony McNamara concludes that the consultative process was a “welcome and tangible acknowledgment of the place of the *sensus fidelium* in the teaching office of the church.” (Tony McNamara, “Sensus Fidelium and the Synod on the family: New Challenges” in *Doctrine and Life*, Vol. 64, no 1, January 2014, 16.) Also see Ignace Berten, *Les Divorcés remariés peuvent-ils communier ? Enjeux ecclésiaux des débats autour du Synode sur la Famille et d’Amoris Laetitia* (Namur : Jésuites, 2017).

<sup>505</sup> Ibid.

underlines how holy the people of God are. Helped by the Holy Spirit, the people of God in their holiness perceive intuitively the divine realities even though they are not able to theologise it.

A leading American theologian Bradford E. Hinze, president of the Catholic Theological Association of America, also calls it ‘prophetic obedience’.<sup>506</sup> For him, the Catholic Church under Pope Francis is “witnessing an astonishing new springtime for people of God ecclesiology (...) the image of the Church is that of the holy, faithful people of God.”<sup>507</sup> Hinze also underlines the fact that Pope Francis’ papacy refers to a synodal church. In a synodal view of the church, “the people of God ‘journey together’, meeting face to face, and discerning the way forward in community.”<sup>508</sup> He describes Pope Francis’ synodal vision in the following terms:

This synodal vision reflects Francis’s conviction that the Spirit is at work in the life of the local Church, each rooted in a particular people and culture, each bringing a particular charism to enrich the universal church (...) In the spirit of John XXIII, Francis is instigating a season of Pentecost. We are seeing a new wave of implementation of Vatican II’s teachings on the prophetic office of all the faithful and the collegiality of bishops.<sup>509</sup>

Another theologian Walter Kasper, reflecting Pope Francis’ conception of the Church, concludes that Francis understands the Church as the people of God.<sup>510</sup> But this understanding of the church as people of God is imbued with concrete life. Kasper invites all of us to understand Pope Francis’ theology of the people of God in the perspective of the theology of the people and beyond. He states:

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<sup>506</sup> Bradford E. Hinze, “Listening to the Spirit” in *The Tablet*, Vol. 271, no 9203, (June 2017), 4. For Hinze, Prophetic obedience is rooted in the *sensus fidei* of the people of God. He states: “Prophetic obedience does not entail blind capitulation to authority, nor is it the mindless following of the populist mob. It requires heeding the signs of the times, honestly facing reality, and wrestling with it. Rather than uncritically succumbing to received opinions or accepted traditions, prophetic obedience tests and in certain cases interrogates these in the light of the living faith of the Church, recognised and received in the *sensu fidei*.” (Ibid.)

<sup>507</sup> Ibid.

<sup>508</sup> Ibid.

<sup>509</sup> Ibid.

<sup>510</sup> Walter Kasper, *Pope Francis ‘Revolution of Tenderness and Love: Theological and Pastoral Perspectives* (Trans. William Madges; New York: Paul Press, 2015), 37.



One can correctly understand Pope Francis' style against the background of the theology of the people. This style is not good-natured folksiness or even cheap populism. Behind the pope's pastoral style, which is close to the people, stands an entire theology, indeed his mysticism of the people. For him the church is far more than an organic and hierarchical institution. It is above all the People of God on their way to God, a pilgrim and evangelizing people that transcends every—even if necessary—institutional expression.<sup>511</sup>

For Kasper, Pope Francis is opposed to every form of clericalism.<sup>512</sup> Francis wants the participation of the people of God in the life of the church. All missionary disciples should be invited and included in decision making. Lay ministry should help to transform everyday society. In keeping with this line of thought, Thomas Rausch, speaks about a “Listening Church”.<sup>513</sup> In an interview with Father Antonio Spadaro, Pope Francis was asked about the meaning of the expression “thinking with the church” used by Saint Ignatius in the *Spiritual Exercises*. The Holy Father answered this question by referring to the image of the Church of *Lumen Gentium* 12 as the “holy, faithful people of God”.<sup>514</sup>

Pope Francis states:

Thinking with the church, therefore, is my way of being a part of this people. And all the faithful, considered as a whole, are infallible in matters of belief, and the people display this *infallibilitas in credendo*, this infallibility in believing, through a supernatural sense of the faith of all the people walking together. This is what I understand today as the ‘thinking with the church’ of which St. Ignatius speaks. When the dialogue among the people and the bishops and the pope goes down this road and is genuine, then it is assisted by the Holy Spirit. So, this thinking with the church does not concern theologians only.<sup>515</sup>

For Rausch, if Pope Francis reclaims the notion of the church's *infallibilitas in credendo*, it is because the Holy Father wants “to see a church in which the *sensus fidelium* is effectively honoured.”<sup>516</sup> But according to Kasper the teaching of the *sensus*

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<sup>511</sup> Ibid., 38.

<sup>512</sup> Also see John Edgar Raub, *Francis, Repair My Church: Pope Francis Revives Vatican II* (Eugene, OR: Wipf and stock, 2014), 68-74.

<sup>513</sup> Thomas Rausch, “A Listening Church” in *Go into the Streets*, 77.

<sup>514</sup> Ibid., 80. Also see, Antonio Spadaro, “Interview with Pope Francis,” available at [https://w2.vatican.va/content/francesco/en/speeches/2013/september/documents/papa-francesco\\_20130921\\_intervista-spadaro.pdf](https://w2.vatican.va/content/francesco/en/speeches/2013/september/documents/papa-francesco_20130921_intervista-spadaro.pdf) (accessed 28/06/2017).

<sup>515</sup> Ibid.

<sup>516</sup> Ibid., 88.

*fidei* is understood by Pope Francis as “a matter of faith and living the life of faith.”<sup>517</sup> For Catherine Clifford, this means that “the pastors of the church must be attuned to the *sensus fidelium*, the sense of faith or instinctive capacity of the baptized faithful to recognize and discern the call of the gospel.”<sup>518</sup> It entails that bishops should develop structures of dialogue and participation, which means that they should be able to listen to the people of God.<sup>519</sup> Eduardo Echeverria, in similar terms, remarks that the notion of *sensus fidei* should be related to discernment. For him, the capacity to discern is an expression of the *sensus fidei*. He wonders whether Pope Francis is suggesting that the opinions of the faithful should be identified with the *sensus fidei*. He states:

Is Pope Francis suggesting that the opinions of the faithful may be identified with the *sensus fidei*? ‘No’ is the brief answer to this question here. “For it is possible for a believer to have a false opinion through a human conjecture, but it is quite impossible for a false opinion to be the outcome of faith.” (...)

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<sup>517</sup> Ibid., 41. Kasper recalls that “The doctrine of *sensus fidei* is imparted to every Christian through the Holy Spirit in baptism, is very well established in the biblical and theological tradition but has often been neglected. John Henry Newman showcased it in a renewed way in his famous essay, ‘On Consulting the Faithful in Matters of Doctrine’ and the last Council has renewed it again. It states that the people of God as a whole cannot err in matters of belief (LG 12; EG 119, 139, 198).” (Ibid.) See John Henry Newman, *On Consulting the Faithful in Matters of Doctrine* (ed. John Coulson; London: Geoffrey Chapman, 1961), 53-106. This is an article published in July 1859 in the *Rambler*. John Coulson states that Newman’s work was fundamental not only for the understanding of his doctrinal development but also for the importance he attached to the laity in his theology. Talking about Newman’s controversial article at that time, Coulson declares: “Today, lay initiative is everywhere on the increase; it has received unprecedented papal encouragement; and it has had for its formation such works as Père Congar’s *Lay People in the Church*. In Newman’s day, however, the reverse was true, and his publication of this essay was an act of political suicide from which his career within the Church was never fully to recover;” (Ibid., 1-2) For Newman “the *fidelium sensus* and *consensus* is a branch of evidence which it is natural or necessary for the Church to regard and consult, before she proceeds to any definition” (Ibid., 55) Many other articles on the subject can also be found in no 18 of *Reading in Moral Theology*. Talking about John Henry Newman’s *sensus fidelium* there is an article by the Jesuit Paul G. Crowley. (See, Paul G. Crowley, “Catholicity, Inculturation, and Newman’s *Sensus Fidelium*” in *The Sensus Fidelium and Moral Theology: Readings in Moral Theology No. 18* (eds. Charles E. Curran and Lisa A. Fullam; New York: Paulist Press, 2017), 54-72.)

<sup>518</sup> Catherine E. Clifford, “A dialogic Church” in *Go Into the Streets*, 96.

<sup>519</sup> Ibid. Referring to Pope Francis statement about the faith of the homosexual person, Brian N. Massingale reflects on the relationship between the *Sensus Fidelium* and the LGBT experience. He demonstrates that “the *sensus fidelium* of LGBT persons expresses itself in the same manner as that of other faithful believers.” (Brian N. Massingale, “Beyond ‘Who am I to Judge?’ The *Sensus Fidelium*, LGBT Experience, and Truth-Telling in the Church,” in *Learning from All the Faithful: A contemporary Theology of the Sensus Fidei* (Eugene, OR: Pickwick, 2016), 179.) Talking about the *Sensus Fidei* in the recent history of the Latin American Church where Pope Francis’ theological thought roots, Maria Clara Lucchetti Bingemer enumerates three landmarks: Liberation theology and the Option for the Poor; The popular reading of the Bible and the interaction between women theologians and women from grassroots communities. Women started to study theology and to take leadership in the religious communities. (Maria Clara Lucchetti Bingemer, “The *Sensus Fidei* in the Recent History of the Latin American Church” in *Learning from All the Faithful: A contemporary Theology of the Sensus Fidei* (Eugene, OR: Pickwick, 2016), 341-42.

the *sensus fidei* is embedded in and flows from the theological virtue of faith. For another thing, being a gift of God's grace, theological faith is that "which enables one to adhere personally to the Truth," and it is for that reason that the *sensus fidei* "cannot err".<sup>520</sup>

Moreover, Echeverria cites the words of the CDF, which recalls that there is no personal faith without any relation to the faith of the Church. It means that there should be an interconnection in harmony between the personal faith and the faith of the church. He warns the readers to be very careful not to conclude that the *infallibilitas* of all the faithful is a form of populism. He adds that the infallibility of all the faithful is "the experience of 'holy mother the hierarchical church', as St. Ignatius called it, the church of the people of God, pastors and people together, the church in the totality of God's people."<sup>521</sup> It is not because laity should be a witness to their faith that it should be concluded that there is a parity in regard to the teaching function of both the *sensus fidelium* and the magisterium. Echeverria underlines that such parity is not posited by *Lumen Gentium*.<sup>522</sup> Inspired by the French theologian Yves Congar Echeverria asserts:

The magisterium of the Church is ultimately charged with determining what the normative substance of Christian belief is, that is, authentic Catholic teaching, because "decisive authority is located in the power of the keys, given to Peter by Christ the Lord himself. Christ's lay faithful, while they do teach, do not do so in virtue of apostolic authority; the hierarchy alone teaches with such authority, expounding and maintaining the continuity and consistency of Christian belief, indeed, of the deposit of faith by way of authoritative judgment."<sup>523</sup>

It is evident that since Francis' election as pope, the notion of *sensus fidei* has been highlighted and also the theology of the people of God. Francis' position on *sensus fidei* is anchored on Vatican II, particularly in *LG* 12 and *Dei Verbum* 10, 34 where the fathers of the council articulated in clear terms that the divine revelation is given to the

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<sup>520</sup> Eduardo J. Echeverria, *Pope Francis: The Legacy of Vatican II* (Florida: Lectio, 2015), 190.

<sup>521</sup> Ibid. See Also Antonio Sparado, *A Big Heart Open to God: A Conversation with Pope Francis* (America: HarperCollins, 2013), 25.

<sup>522</sup> Ibid.

<sup>523</sup> Ibid., 191. Also see the book of Yves M.J. Congar, *Jalons Pour une théologie du Laïcat* (Paris: Cerf, 1954);

whole church and not to only a specific group or office holder.”<sup>524</sup> It was picked up, and studied anew by the ‘International Theological Commission’ just a year after Francis’ election and a document entitled *Sensus Fidei in the life of the church* was published on it. Scannone also invites the readers of Pope Francis to understand his concern for the people of God not only in relation to his symbolic gestures and interviews as the head of the church but also in relation to what is considered as “a ‘roadmap’ of his pontificate, the apostolic exhortation *Evangelii Gaudium*.”<sup>525</sup>

For Scannone, there are few passages in EG where Pope Francis stresses the people of God such as: EG 95 and 96 where the Holy Father uses the expression ‘faithful people’ and “he explicitly recognizes as “a mystery rooted in the Trinity, but that has its historical concreteness in a pilgrim and evangelizing people, and that transcends all necessary institutional expression” (EG 101).”<sup>526</sup> In EG 113, where Pope Francis underlines the togetherness of the people of God in the mission of evangelization, Scannone sees the expression not only as the echo of the Scripture but also as the spirit

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<sup>524</sup> Gerard Mannion, “Making Sense of the Faith: The Dynamics of *Sensus Fidelium* and the Role of Reception” in *Ecclesiology* 13 (2017), 385. For the recent theological discussion on *Sensus Fidei*, the article by Fáinche Ryan should be mentioned here. Reflecting about ‘The *Sensus Fidelium* in recent theological discussion’ Ryan also mentions that “in 2015 the Convention of the Catholic Theological Society of America (CTSA) addressed the theological concept, and in 2017 the meeting of the Catholic Theological Association of Great Britain (CTAGB) has the very interesting title, *Sensus Fidelium: Listening for the Echo*.” (Fáinche Ryan, “On Consulting the Faithful in Matters of Doctrine: From Newman to the Second Vatican Council and Beyond,” in *Studies*, Vol. 106, 423 (Autumn 2017), 350. Talking about the Convention of the CTSA in 2015, Fáinche Ryan underlines the relevance of the article by John J. Burkhard on “The *sensus fidelium*: old questions, new challenges” where he highlights the fact that Vatican II stresses the concept of *sensus fidelium* as *locus theologicus*. The article can be found online. Ormond Rush also reflects on the notion of *sensus fidei* from the ecumenical perspective (Ormond Rush, “Receptive Ecumenism and Discerning the *Sensus Fidelium*: Expanding the Categories for a Catholic Reception of Revelation” in *Theological Studies*, Vol. 78, 3(2017), 559-72. Also, Anthony Ekpo focuses on the reinterpretation of Lumen Gentium 12 in relationship to the threefold office of Christ (Anthony Ekpo, “The *Sensus Fidelium* and the Threefold Office of Christ: A Reinterpretation of Lumen Gentium No. 12,” in *Theological Studies*, Vol. 76, 2(2015), 330-46.

<sup>525</sup> Scannone, 126. Scannone asserts that, the gesture of the Holy Father after his election was not trivial. He declares: “Pope Francis’ request that the people bless him almost immediately after appearing in public was striking. Those of us who knew his theological appreciation for the ‘faithful people of God’ were not surprised since this implies at the same time a specific way of conceiving the church as well as recognizing the ‘sense of faith’ of the people and the laity’s role in it.” (Ibid.)

<sup>526</sup> Ibid.

of Vatican II and the theology of the people.<sup>527</sup> It should also be understood that when Francis speaks about God's people, he refers to a people of many faces and different cultures (EG 115-121). Commenting on this view of Francis, Scannone asserts: "when he speaks of God's people, Francis refers to its "multiform face" (EG 116) and a "multiform harmony" (EG 117) due to the diversity of cultures that enrich it."<sup>528</sup> It is in this perspective that the Venezuelan theologian Rafael Luciani says that Pope Francis does not reduce the word people to its economic and sociological categories in the Marxist method's way rather "he understands that the starting point must be a real and daily connection with the poor, the study of popular culture, and a recognition of its own proper ethos."<sup>529</sup>

Furthermore, Pope Francis' conception of the *sensus fidei* emphasises communion and dialogue.<sup>530</sup> There is a sense of togetherness and a call to participation of the people of God in today's challenges to the Church. Thomas Knieps-Port le Roi illustrates this through the synodal process initiated in 2013 by Pope Francis. Before the extraordinary and ordinary assemblies of the synod, Pope Francis chose to hold broad consultation processes among the faithful in the local churches.<sup>531</sup> Pope Francis' willingness to listen

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<sup>527</sup> Ibid. See "The salvation which God has wrought, and the Church joyfully proclaims, is for everyone. [82] God has found a way to unite himself with every human being in every age. He has chosen to call them together as a people and not as isolated individuals. [83] No one is saved by himself or herself, individually, or by his or her own efforts. God attracts us by taking into account the complex interweaving of personal relationships entailed in the life of a human community. This people which God has chosen and called is the Church. Jesus did not tell the apostles to form an exclusive and elite group. He said: "Go and make disciples of all nations" (Mt 28:19). Saint Paul tells us in the people of God, in the Church, "there is neither Jew or Greek... for you are all one in Christ Jesus" (Gal 3:28). To those who feel far from God and the Church, to all those who are fearful or indifferent, I would like to say this: The Lord, with great respect and love, is also calling you to be a part of his people!" (EG 113).

<sup>528</sup> Ibid, 127.

<sup>529</sup> Luciani, *Pope Francis*, 13.

<sup>530</sup> To understand that the debate about the theological appeals to the Church as communion and also as an ongoing debate, one should read the fourth chapter of the book by Richard R. Gaillardetz, *By What Authority: A Primer on Scripture, the Magisterium, and the Sense of the Faithful*. In the concluding remarks, Gaillardetz remarks that there is still controversy among theologians about 'communion-ecclesiology.' He underlines two visions: those who refer to communion in support of papal centralization and those who put the emphasis on the local churches and the bishops as their spiritual leaders (Ibid., 72)

<sup>531</sup> Thomas Knieps-Port le Roi, "Church Teaching on Marriage and Family—A Matter of *Sensus Fidelium*," in *Readings in Moral Theology No. 18* (New York: Paulist Press, 2017), 280.

to the people of God is described by Robin Ryan in terms of ‘communion.’ He brings attention to the section on ‘universal communion’ in the second chapter of *Laudato Si’* where Pope Francis recalls this togetherness.<sup>532</sup> Pope Francis states that “as part of the universe, called into being by one Father, all of us are linked by unseen bonds and together form a kind of universal family, a sublime communion, which fills us with a sacred, affectionate and humble respect.” (LS 89). Ryan notes the call of Pope Francis in the concluding section of his encyclical where he emphasizes the communion in Christian belief in the Trinity. Above all Francis is open to dialogue as Ryan quotes saying at the introduction of LS: “We need a conversation that includes everyone” (LS 14).”<sup>533</sup>

Ryan, along the same lines as the previous reflection on the relationship of Pope Francis to Vatican II mentions again the distinctive characteristic of the pastoral dialogue in Pope Francis’ papacy, which illustrates “Francis’ appeal to the teaching of Vatican II about the *sensus fidei* of the whole people of God (LG 12).”<sup>534</sup> Beyond dialogue Pope Francis pleads for a listening church, which Ormond Rush called ‘listening to the *sensus fidelium*.’<sup>535</sup> He refers to Pope Francis address during his meeting on the family in 2014 as an expression of the call of the Holy Father for a listening church. He quotes:

To find what the Lord asks of his Church today, we must lend an ear to the debates of our time and perceive the “fragrance” of the men of this age, so as to be permeated with their joys and hopes, with their griefs and anxieties (cf. *Gaudium et Spes*, n. 1). At that moment we will know how to propose the good news on the family with credibility (...) For the Synod Fathers we ask the Holy Spirit first of all for the gift of listening: to listen to God, that with him we may hear the cry of the people; to listen to the people until breathing in the will to which God calls us.<sup>536</sup>

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<sup>532</sup> Robin Ryan, “The Theme of Communion in *Laudato Si’*” in *New Theology Review*, Vol. 29, 1 (September 2016), 19.

<sup>533</sup> *Ibid.*, 20.

<sup>534</sup> *Ibid.*, 26.

<sup>535</sup> Ormond Rush, “Inventing the Pyramid” in *Theological Studies*, Vol. 78, 2 (2017), 320.

<sup>536</sup> Pope Francis, “Address of His Holiness Pope Francis during The Meeting on the Family,” available at [https://w2.vatican.va/content/francesco/en/speeches/2014/october/documents/papa-francesco\\_20141004\\_incontro-per-la-famiglia.html](https://w2.vatican.va/content/francesco/en/speeches/2014/october/documents/papa-francesco_20141004_incontro-per-la-famiglia.html) (accessed 22/11/2017).

For Ormond Rush, Francis' call for a listening Church is not only pedagogical but it is also theological. From the pedagogical perspective, the Church needs to speak the language of the people of God and this cannot happen without dialogue because "bishops need to listen to the *sensus fidelium* in order to communicate the Gospel effectively and credibly within changing cultural and social contexts."<sup>537</sup> From a theological front, "the *sensus fidelium* must be listened to because it is a *locus theologicus*, a place where the revealing God can be heard speaking to the church today."<sup>538</sup> Pope Francis' plea for a listening church is also expressed in his address during to the 50<sup>th</sup> anniversary of the Synod of the bishops. The Holy Father communicates his understanding of the synodal church as follows:

A synodal church is a listening church, knowing that listening "is more than feeling." It is a mutual listening in which everyone has something to learn. Faithful people, the College of Bishops, the Bishop of Rome: we are one in listening to others; and all are listening to the Holy Spirit, the "Spirit of truth" (Jn 14:17), to know what the Spirit "is saying to the Churches" (Rev 2:7).<sup>539</sup>

Indeed, a listening church is essential to the process of what Gaillardetz summarizes as "becoming a community of dialogue and discernment."<sup>540</sup> What appears today in Pope Francis' social and theological thought is already found in some of the writings of Father Jorge Mario Bergoglio. The next section will explore another key to understanding Pope Francis based on some of his previous writings as Father and later Cardinal Bergoglio.

#### **4.3.4 A Journey through some of Jorge Mario Bergoglio's Writings**

One of the keys to accessing the theological and social thought of Pope Francis is also by reviewing some of his writings before his election as Pope. It is the aim of this section to

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<sup>537</sup> Rush, *Ibid.*

<sup>538</sup> *Ibid.*, 321.

<sup>539</sup> Pope Francis, "Pope Francis Address to the 50<sup>th</sup> Anniversary of the Synod of Bishops," available at <http://futurechurch-blog.org/2015/10/pope-francis-october-17-2015-address-at-the-50th-anniversary-celebration-of-the-synod-of-bishops/> (accessed 22/11/2017).

<sup>540</sup> Gaillardetz, 117.

make a brief review of some selected works of Bergoglio in connection to his pastoral and theological approach today.

One of the books of Father Jorge Mario Bergoglio, which describes his deep roots in the Ignatian tradition is entitled *Meditaciones para Religiosos* (1982) or meditations for the consecrated life.<sup>541</sup> This book is a compilation of Bergoglio's talks during his spiritual retreats on the *Spiritual Exercises* of Saint Ignatius of Loyola when he was provincial superior of the Jesuits in Argentina (1973-79). The book is divided into three parts: the first part is a collection of the texts of the retreats given by Father Bergoglio inspired by the *Spiritual Exercises*. The Second and the third parts of the book are on the Ignatian retreat using the *Spiritual Exercises*.

This book highlights the road map of Bergoglio's mandate as provincial superior in Argentina. It also describes how to deal with new religious vocations in the province, the ongoing formation in the spirit of Vatican II and the theme of reconciliation.<sup>542</sup> For example, what is very striking in Bergoglio's book is the description of the figure of the superior of the religious community. Bergoglio portrays the religious superior as a man of edification and as a father: "El superior local: un hombre *ad aedificationem*," "El superior local: un padre."<sup>543</sup> For Bergoglio, the leader is the one who is continually edified through: "La formación: con los criterios de "formación permanente", "inculturación" y

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<sup>541</sup> Also see Jorge Mario Bergoglio, "Writings on Jesuit Spirituality I" in *Studies in The Spirituality of Jesuits*, Trans. Philip Endean, 45/3, Autumn 2013, 1-30; see ID., "Writings on Jesuit Spirituality II" in *Studies in The Spirituality of Jesuits*, Trans. Philip Endean, 45/4, Autumn 2013, 1-43. There is also the retreat given by Cardinal Bergoglio on the *Spiritual Exercises* to the Spanish bishops from the 15 to 22 January 2006 on Hope. (ID., *En El Solo La Esperanza: Ejercicios Espirituales A Los Obispos Españoles (15 al 22 de enero de 2006)* (Madrid: Biblioteca de Autores Cristianos, 2013). ID., *Reflexiones de Un Pastor: Misericordia, Misión, Testimonio, Vida* (Romana: Librería Editrice vaticana, 2013). ID., *Reflexiones En Esperanza* (Romana, Librería Vaticana, 2013). ID., *Mente abierta, corazón creyente* (Buenos Aires: Claretiana, 2012).

<sup>542</sup> Jorge Mario Bergoglio, *Meditaciones para Religiosos* (Buenos Aires: Diego de Torres, 1982), 17-111.

<sup>543</sup> *Ibid.*, 96-98.



“pobreza” (...) El modo de vida, como servicio a los demás, con lo que implica de servicio a los pobres, de la justicia, hospitalidad.”<sup>544</sup>

These characteristics appear in Pope Francis’ lifestyle: humility, openness to dialogue, love for the poor. Bergoglio describes the relationship between the religious superior and a member of the community as the highest form of dialogue “forma más alta de dialogo.”<sup>545</sup> The superior or the leader should be humble: “La actitud supone en el superior un grado mayor de humildad”<sup>546</sup>

In his book Father Bergoglio also dedicates a chapter on the mystery of the Incarnation “la Encarnación y el nacimiento.”<sup>547</sup> Following the steps of their founder and other companions who founded the order, Bergoglio argues that the theology of Incarnation from the Spiritual Exercises helps Jesuits to read the signs of the times:

Esa mirada que la meditación de la encarnación nos hace contemplar "como las tres personas divinas miraban toda la planicia o redondez de todo el mundo llena de hombres (...) San Ignacio quiere que miremos a los hombres. “Ignacio y los otros primeros compañeros quisieron, en la experiencia espiritual de los Ejercicios, mirar atentamente al mundo de su tiempo para descubrir sus interpelaciones (...)”<sup>548</sup>

In other words, the meditation on the incarnation of the three persons of the Trinity leads the Jesuit to the contemplation of today’s world with its problems. As Saint Ignatius read the world through the lens of the mystery of the Incarnation, every Jesuit is called to do the same and to look attentively at the world of their time to discover their interpellations.<sup>549</sup>

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<sup>544</sup> Ibid., 97. Also see Christ Lowney, *Pope Francis: Why He Leads The Way He Leads: Lessons from the First Jesuit Pope* (Chicago: Loyola, 2013). Pope Francis, *Open Mind, Faithful Heart: Reflections on Following Jesus* (Trans. Joseph V. Owens; United States of America: Claretian, 2013).

<sup>545</sup> Ibid., 99.

<sup>546</sup> Ibid.

<sup>547</sup> Ibid., 239.

<sup>548</sup> Ibid., 239-240.

<sup>549</sup> Ibid.

In 1991, Father Jorge Mario Bergoglio also wrote a short reflection on the theme of corruption entitled *Quelques réflexions sur le thème de la corruption*.<sup>550</sup> In this brief reflection, he not only denounced corruption in the political and social world, but also, he suggests some solutions. For Bergoglio, corruption is the manifestation of a moral crisis.<sup>551</sup> It is also the result of a corrupt heart. The human heart is capable of loving or rejecting love (for example, hating).<sup>552</sup> In this book, Bergoglio raises some questions that might remind us today of his attempts to reform the Roman Curia. This research will highlight this in the next chapter. For example, Pope Francis asks: “Is it possible for a religious to be part of an environment of corruption? Is it possible for a religious to be corrupted?”<sup>553</sup>

Bergoglio recognizes that religious or the religious milieu can be corrupted. The fact that some of the Religious Orders undertook a reform of their institution implies that the environment was infested with corruption. One of the manifestations of corruption is triumphalism.<sup>554</sup> Corruption finds fertile ground in an environment where it feels victorious. Thus, inconsistency and frivolity are forms of corruption.<sup>555</sup> Talking about corruption in the religious life, Bergoglio states: “The soul begins to be satisfied with the products offered to it by the supermarket of religious consumerism. More than ever, it sees the consecrated life as an immanent “realization” of personality. For many, this realization will consist in professional satisfaction (...)”<sup>556</sup> This quotation might remind

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<sup>550</sup> Jorge Mario Bergoglio, *Guérir de la Corruption* (Trans. Parole et Silence; Buenos Aires: Claritiana, 2013).

<sup>551</sup> *Ibid.*, no 1.

<sup>552</sup> *Ibid.*, no 2-3.

<sup>553</sup> *Ibid.*, no 5.

<sup>554</sup> *Ibid.*, no 15-16.

<sup>555</sup> *Ibid.*

<sup>556</sup> This is the translation from French of “L’âme commence à se satisfaire des produits que lui offre le supermarché du consumérisme religieux. Plus que jamais elle vit la vie consacrée comme une « réalisation » immanente de la personnalité. Pour beaucoup, cette réalisation consistera dans la satisfaction professionnelle (...)” (*Ibid.*, no 29)

the readers of the address of Pope Francis about the 15 ailments of the Roman Curia in December 2014 that this research will analyse in the next chapter.

In 2005 Cardinal Bergoglio, then archbishop of Buenos Aires, gave an address on the occasion of the “VIII Jornada de Pastoral Social.” It is in the context of the preparation of those days of reflection on the social pastoral activity in the archdiocese of Buenos Aires that a booklet entitled *La Nación Por Construir: Utopía, pensamiento, y compromiso*<sup>557</sup> was published. This meeting was the occasion for Cardinal Bergoglio to address the faithful as pastor on the necessity to work together, to strengthen ties, to reconstruct, and to create a future that includes everyone.<sup>558</sup> The *Nacion Por Construir* expresses not only the will of the Christian community but also the work of the same Christian community in its diversity to identify and to address its problems or its deep crisis. Cardinal Bergoglio points out what he calls ‘*orfandad*’ or ‘orphan-hood’ in today’s world in three aspects: firstly, a fragmented society marked by crisis that has severed its community ties. Secondly, the fragmentation of society implies a crisis of identity as there is an absence of landmarks in the cities: “La ciudad va poblándose de *no-lugares*, espacios vacíos sometidos exclusivamente a lógicas instrumentales, privados de símbolos y referencias que aporten a la construcción de identidades comunitarias.”<sup>559</sup> Thirdly, Cardinal Bergoglio mentions “la caída de las certezas” or ‘the disappearance of certainties.’ He notes the disappearance of the fundamentals of the person, the family, and even the faith in Buenos Aires.<sup>560</sup> The Cardinal denounces what he calls “La globalización y pensamiento único,” the dictatorship of globalization and its unique way

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<sup>557</sup> Jorge Mario Bergoglio, *La Nación Por Construir: Utopia, pensamiento, y compromiso* (Buenos Aires: Claretiana, 2005), 7.

<sup>558</sup> *Ibid.*, 8.

<sup>559</sup> *Ibid.*, 20.

<sup>560</sup> *Ibid.*, 21.

of thinking. He opposes especially the aspect of globalization that imposes its ‘uniform’ values, practices, and the cultural, intellectual and spiritual subordination.<sup>561</sup>

Two propositions of Cardinal Bergoglio for the better construction of the nation appear today constantly in the social and theological approach of Pope Francis: firstly, the power of service and secondly, the conversion of attitudes.<sup>562</sup> The readers can also find here the root of Pope Francis’ spiritual and pastoral approaches: “True faith in the incarnate Son of God is inseparable from self-giving, from membership in the community, from service, from reconciliation with others.” (EG 88). This power of service is also found in the Apostolic Exhortation *Gaudete et Exsultate: Rejoice and be Glad* (2018) (hereafter GE) where Francis underlines service to our brothers and sisters as the way to holiness: “Do you work for a living? Be holy by labouring with integrity and skill in the service of your brothers and sisters.” (GE 14), “Yet the Lord calls us to put out into the deep and let down our nets (cf. Lk 5:4). He bids us spend our lives in his service. Clinging to him, we are inspired to put all our charisms at the service of others.” (GE 130).

In another conversation with Cardinal Bergoglio in 2009, two journalists, Francesca Ambrogetti and Sergio Rubin, highlight Bergoglio’s core beliefs, his personal history, his wisdom, intellect, compassion, humility, and ultimately his humanity.<sup>563</sup> In this interview, the two journalists ask Bergoglio’s opinion about the decrease in the number of Catholics in Argentina and how the Catholic Church in Argentina should tackle the situation. Cardinal Bergoglio answers by inviting pastors to go out and meet people. He uses the expression “friendly welcome” to describe the new mission of the

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<sup>561</sup> Ibid., 24-25.

<sup>562</sup> Ibid., 70-72. Also see Jorge Mario Bergoglio, *El Verdadero Poder es el Servicio* (Buenos Aires: Claretiana, 2007). Jorge Mario Bergoglio, *Educación: Exigencia y Pasión, Desafíos para educadores cristianos* (Buenos Aires: Claretiana, 2013).

<sup>563</sup> Francesca Ambrogetti and Sergio Rubin, eds., *Conversation with Jorge Bergoglio* (Trans. Laura Dail; New York: Penguin, 2013), ix.

Church.<sup>564</sup> He acknowledges the temptation of the clergy to fall into what he calls “being administrators and not pastors.”<sup>565</sup> For example, Bergoglio points out that when people come to the parish to request the sacraments or anything else they are not met by the priest but by the parish secretary who can be rough with people. Bergoglio recalls that congregations used to call the parish secretary in his diocese ‘*tarantula*’, a Spanish word, which means a large black spider, which is always ready to bite. Bergoglio asserts that “these kinds of people not only scare people away from the priest and the parish, but also people from the Church and from Jesus.”<sup>566</sup> Cardinal Bergoglio underlines the importance of meeting people pastorally in the following terms:

It is essential that Catholics – by which I mean the clergy as much as the laypeople – go out to meet people. A very wise priest once told me that we were facing a situation that is the complete opposite of the Parable of the Lost Sheep. (...) I sincerely believe that today, the most basic thing for the Church is (...) to go out and seek people, to know people by name. Not just because this is its mission, as the Gospel proclaims, but because if it isn’t done, then it will do us harm.<sup>567</sup>

The readers can acknowledge in this quotation what also appears in clear terms through the call of Pope Francis in EG:

Let us go forth, then, let us go forth to offer everyone the life of Jesus Christ. Here I repeat for the entire Church what I have often said to the priests and laity of Buenos Aires: I prefer a Church which is bruised, hurting and dirty because it has been out on the streets, rather than a Church which is unhealthy from being confined and from clinging to its own security. I do not want a Church concerned with being at the centre and which then ends by being caught up in a web of obsessions and procedures (EG 49).

Bergoglio argues that the Church should change its way of doing pastoral ministry, it should move from ‘the Church coming model’ where people come to the church to the model of ‘missionary approach’, which implies to go where the people are.<sup>568</sup> For Bergoglio,

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<sup>564</sup> Ibid., 79.

<sup>565</sup> Ibid.

<sup>566</sup> Ibid.

<sup>567</sup> Ibid., 81.

<sup>568</sup> Ibid., 85.

we cannot remain in the ‘patronage’ mind-set, which passively waits for ‘the client’ or parishioner to come, but instead we need a structure that enables us to go where we are needed, where the people are. We need to go to the people who want us but won’t come to outdated institutions and customs that don’t respond to their expectations or sensibilities.”<sup>569</sup>

This pastoral and spiritual approach appears clearly in the papacy of Pope Francis.

For Cardinal Bergoglio, “pastoral conversion calls us to go from being a Church that is the ‘regulator of the faith’ to one that is a ‘transmitter and facilitator of the faith’.”<sup>570</sup>

#### **4.4 CONCLUSION**

This chapter aimed to identify some landmarks that can help us better understand Pope Francis’ theological thought in general and to find an answer to the question whether Pope Francis belongs to any specific theological school. It had two main sections.

Firstly, this reflection led us to realise that the readers of Pope Francis cannot understand fully his theological thought without considering his time in Buenos Aires where he was born, grew up and exercised his ministry as a Jesuit priest, a provincial, a bishop, an archbishop, and a cardinal. It has also been noted that the Salesians whose charism is the care for the youth, especially those who are marginalised, had a tremendous influence on Bergoglio in his youth. This study further noted that some strong figures and institutions in his life such as his grandmother, Rosa, and the Brazilian archbishop Dom Helder Camara and CELAM influenced him.

Secondly, the journey into the theological thought of Pope Francis allowed us to discover that the Holy Father, by his deeds and his words, is trying to translate the vision of Vatican II. It could be said that one can only understand Pope Francis in the light of Vatican II. This perception of him is justified by his use of terms such as collegiality, synodality, etc. This conciliar view also emerges in its understanding of the concept,

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<sup>569</sup> Ibid., 85.

<sup>570</sup> Ibid., 86.

tradition. He is also familiar with the notion of *sensus fidei* and the role of the people of God in the Church.

Another key to understanding Pope Francis explored in this chapter was his relationship to the theological school of Argentina. For his Jesuit confrère Juan Carlos Scannone, the influence of the theology of the people is evident in his encyclical *Evangelii Gaudium*. Francis was familiar with the founding fathers of this theological current especially, Gera Lucio who had an Italian background like Pope Francis. Concerning the question: what theological school of thought does Francis belong? It could be clearly said that he belongs to the theological school of Argentina.

This chapter also reviewed some selected writings of Father Bergoglio in order to understand the backdrop of his social and theological thought today. It appears that Pope Francis' spiritual and pastoral approach today is deeply rooted in his pastoral experience in Buenos Aires. This is because as Cardinal Bergoglio, he was already inviting his priests not only to personal conversion, but also to go forth to the people of God. This research will deepen the understanding of Pope Francis' spiritual and pastoral language in the last chapter.

## CHAPTER FIVE

### CRITICAL ASSESSMENT OF POPE FRANCIS' SOCIAL AND THEOLOGICAL THOUGHT

#### 5.1 INTRODUCTION

Since his election, Pope Francis has aroused admiration from some people and criticism from others. On the year of his election, he was made personality of the year 2013 by the *New York Times*. Several titles have made headlines about him and this has continued relentlessly during his pontificate: “The Great Reformer,”<sup>571</sup> “Is the Pope a Marxist?”, “The Francis revolution at five”,<sup>572</sup> The Progressive Pope, “Is the Pope a Catholic?” “The Quiet Revolution of Pope Francis”<sup>573</sup> etc ... These contradictory titles show the complexity of the figure of Pope Francis. That is why, after examining some key points that allow us to better understand Pope Francis in the previous chapter, this chapter focuses on the critical assessment of Pope Francis’ social and theological thought.

It is divided into four parts: the first section explores Francis’ criticism of the economy of exclusion. The second point studies the reform of the Roman Curia made by Pope Francis and his invitation to his collaborators to adopt a simpler lifestyle close to the poor. The third point starts by presenting the debate on the synod of the family and on *Amoris Laetitia*, which then analyses the moral theology behind the pastoral approach of Pope Francis to vulnerable families. Finally, the fourth section shows how Francis’ teachings on the family are in continuity with those of his predecessors and the social teaching of the Church in general.

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<sup>571</sup> Title of the book by Austen Ivereigh one of the first biographies of Francis in English after his election.

<sup>572</sup> This is the title of an article by Michael Kelly in the *Irish Catholic* (March 15, 2018), where he assesses Pope Francis’s first five years of Pontificate.

<sup>573</sup> This is a title of an article by Richard Gaillardetz where the theologian reflects, in a balanced way, on the message behind the dubia or “doubts” of the four Cardinals to Pope Francis. (Richard Gaillardetz, “Is the Pope a Catholic?” in *The Tablet*, 7 October 2017. Also see on the debate about Pope Francis and the future of Catholicism the book by the columnist for the New York Times Ross Douthat where he wonders whether Pope Francis “ends up as a hero or a tragic figure for Catholics, but also whether he’s a hero or a failure for the world.” (See the cover of Ross Douthat, *To Change the Church: Pope Francis and the Future of Catholicism* (London: Simon & Schuster, 2018).) Gerry O’Hanlon, *The Quiet Revolution of Pope Francis: A Synodal Catholic Church in Ireland?* (Dublin: Messenger, 2018).



## 5.2 POPE FRANCIS AND THE CRITIQUE OF THE ECONOMY OF EXCLUSION

Francis' criticism of the economy of exclusion (EG 53) and the call for social justice is not always understood by everyone. For example, Francis has been accused in the past of being a communist<sup>574</sup>. Based on his statement in EG 53 that the economy of exclusion kills, Andrea Torielli and Giacomo Galeazzi, two Italian journalists and specialists on the Vatican, wrote a book entitled *Pope Francis on Capitalism and Social Justice*. In the preface entitled "Is the Pope a Marxist?", we can read the following quotation from the late Helder Camara, former Archbishop of Recife in Brazil and a friend of Bergoglio: "When I give food to the poor, they call me a saint. When I ask why the poor have no food, they call me a communist?"<sup>575</sup> Donal Dorr also supports Pope Francis' criticism of the economy of exclusion as follows:

In the light of the very outspoken condemnation of the capitalist system as it is practiced at present, it is no wonder that the conservative radio host Rush Limbaugh should say about *Evangelii Gaudium*: 'This is just pure Marxism coming out of the mouth of the Pope.' Apparently the direct and uncompromising quality of Francis's words are more effective than the more measured statements of previous popes in making it clear that the present political-economic system is quite incompatible with Catholic social teaching.<sup>576</sup>

Pope Francis' criticism of the economy of exclusion raises at least three questions: Firstly, what does Pope Francis say about an economy that does not integrate everyone? Secondly, why is Pope Francis accused of being a Marxist? Thirdly, is what Francis is saying in continuity with the social teaching of the Church?

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<sup>574</sup> In an interview with the French sociologist Dominique Wolton, Pope Francis, talking about the women who have marked his life, refers to a woman who taught him to think about political reality. Pope Francis alludes to this woman who was a communist in the following terms: "c'était une chimiste, chef du département où je travaillais, dans le laboratoire bromatologique. C'était une communiste du Paraguay, du parti qui là-bas s'appelle Febrerista (...) Elle m'a donné des livres, tous communistes, mais elle m'a enseigné à penser la politique. Je dois tant à cette femme." (Wolton, 376.) Her name is Esther Balestrino De Careaga. She became the founder of the association of the women who lost children in Argentina. In 1977, she was kidnapped then killed and her body was thrown in the sea from an airplane. (Ibid., 378)

<sup>575</sup> Andrea Torielli and Giacomo Galeazzi, *Pope Francis on Capitalism and Social Justice*, vii.

<sup>576</sup> Donal Dorr, "Pope Francis and Catholic Social Teaching," in *Doctrine & Life*, Vol. 64, No 2, (February 2014), 7.

If there is one thing that strikes us when Pope Francis criticizes the economy of exclusion it is the honesty or bluntness of his language. In the economy of exclusion,

Human beings are themselves considered consumer goods to be used and then discarded. We have created a “throw away” culture which is now spreading. It is no longer simply about exploitation and oppression, but something new. Exclusion ultimately has to do with what it means to be a part of the society in which we live; those excluded are no longer society’s underside or its fringes or its disenfranchised – they are no longer even a part of it. The excluded are not the “exploited” but the outcasts, the “leftovers” (EG 53).

Pope Francis’ criticism attracted public attention but also complaints, as Thomas R. Rourke explains:

Complaints have come from pundits and some scholars in the United States. The critics make the broad claim that the Pope either does not understand or does not appreciate the free-market system, which his critics tout as having raised millions out of poverty. This ties into a second set of criticisms—accusations that the Pope is a Marxist, communist, socialist, (...).<sup>577</sup>

Commenting on these complaints and accusations, Rourke argues that it is safe to affirm that the critics of Francis have a problem with the Catholic Church’s social teaching. The critics of Francis ignore the perennial demand of the Church for economics and they do not wish to considerer the moral dimension of economic life. Rourke repeats that Francis speaks as a pastor and “Economics is an important component of the life of the people, and pastors cannot be indifferent to it.”<sup>578</sup> Pope Francis asserts that “The Church’s pastors, taking into account the contributions of the different sciences, have the right to offer opinions on all that affects people’s lives, since the task of evangelisation implies and demands the integral promotion of each human being.” (EG 182) Pope Francis is aware of the accusation of being a communist. Talking about the danger of ideologies in his Exhortation *Gaudete et Exsultate* (2018), Francis remarks that “harmful ideological error is found in those who find suspect the social engagement of others, seeing it as superficial, worldly, secular, materialist, communist or populist.” (GE 101)

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<sup>577</sup> Rourke, 167.

<sup>578</sup> Ibid.

On economic matters, Pope Francis' style is pastoral. He states in a conversation with the French sociologist Dominique Wolton that he does not want to speak like a professor but rather as a pastor.<sup>579</sup> The honesty and concreteness of his language reveals a series of “Nos” to the imperialism of capitalism, which leaves the most vulnerable in its wake: “No to the economy of exclusion” (EG 53-54), “No to the new idolatry of money” (EG 55-56), “No to a financial system, which rules rather than serves” (EG 57-58), “No to the inequality, which spawns violence” (EG 59-60).<sup>580</sup> Francis' language is not always understood by everyone and that is why sometimes people might have the impression that Francis does not understand the free-market system, or he speaks from outside as Schlag writes:

the decisive question, which the pope does not attempt to answer, is how to effectively achieve the creation of work and foster the creation of wealth and prosperity for all. As a priest and member of a religious order, Francis has the advantage of being able to observe—and to criticize—social and economic developments with great objectivity (Some might say from a detached vantage point). One sometimes gets the impression that he is speaking from the outside to a system in which he does not participate, whose logic and laws he does not fully understand or even like.<sup>581</sup>

Schlag's quotation is similar to the complaints mentioned previously and also repeated by Andrea Tornielli and Giacomo Galeazzi who remark that the conservative commentators from the United States believe that Francis is not only a Marxist but also that this ““Latin American' pope does not know much about economics.”<sup>582</sup> Nevertheless, to accuse Francis of being a Marxist is unfair. When Jorge Maria Bergoglio was superior of the Society of Jesus in Argentina and later archbishop of Buenos Aires, he never adopted the thesis of Liberation theology and was thereby accused of conservatism.<sup>583</sup>

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<sup>579</sup> Dominique Wolton, *Politique et Société*, 364.

<sup>580</sup> Also see Mary T. Malone, “Some Definitive ‘No’s’,” in *The Francis Factor: A New Departure* (Dublin: The Colomba, 2014).

<sup>581</sup> *Ibid.*

<sup>582</sup> Tornielli and Giacomo, x. Also see George Neumayr, *The Political Pope: How Pope Francis is delighting the Liberal Left and Abandoning Conservatives* (New York: Center Street, 2017).

<sup>583</sup> *Ibid.* Nevertheless, Donal Dorr remarks that “In his insistence on the need for structural change Francis is adopting one of the main emphases of Liberation theology. This means that his view is rather different from that of Benedict XVI, whose suspicion of Liberation theology led him to adopt what would be called

Andrea Tornielli and Giacomo Galeazzi conclude that there are certain establishments such as the conservatives in the United States of America, which like to hear the pope speaking about a kind of charity mixed with good feelings that appeases the conscience, but they do not like him to go any further.

Never try to lift a finger or to say that the emperor is naked; never put into question the sustainability of the current system. Never wonder whether it is right that those who die of hunger or cold, whether in Africa or in the streets below our houses, make less news than when the stock market loses two points, as it has often been observed by the man who sits on the throne of Peter today. Then you are called a ‘Marxist’, a ‘pauperist’ a poor dreamer from the end of the world, who needs to be ‘catechized’ by those who, here in the West, know everything of how the world and the church go, and are just waiting to be able to teach it to you.<sup>584</sup>

Despite this criticism, Pope Francis is not anti-business. However, his ideal business is one, which serves the community because this is to be a path to holiness.<sup>585</sup>

That is why he believes that solidarity should be reinforced:

Solidarity is a spontaneous reaction by those who recognize that the social function of property and the universal destination of goods are realities which come before private property. The private ownership of goods is justified by the need to protect and increase them, so that they can better serve the common good; for this reason, solidarity must be lived as the decision to restore to the poor what belongs to them (EG 189).

However, solidarity with the poor is not enough because the vocation to work is inherent to human nature as “we were created with a vocation to work. The goal should not be that technological progress increasingly replaces human work (...) work is a necessity, part of the meaning of life on this earth, a path to growth, human development and personal fulfilment.” (LS 128) Commenting on this quotation, Martin Schlag criticises Francis by asking whether there is any empirical proof that technology replaces

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a more ‘moralizing’ approach – that is, an emphasis more on personal conversion than on structural transformation.” Dorr also adds that “Francis is not naïve as to believe that structural changes can be a substitute for radical personal changes. In fact, he insists on the need for what might be called an attitudinal and cultural transformation alongside a change in political and economic structures: ‘Changing structures without generating new convictions and attitudes will only ensure that those same structures will become, sooner or later, corrupt, oppressive and ineffectual.’ (EG 189)” Dorr, “Pope Francis and Catholic Social Teaching,” 8.

<sup>584</sup> Ibid., ix.

<sup>585</sup> Schlag, 103.

labour. For him, it is not the pope's place to answer the question about whether technology replaces human labour or not. Nevertheless, Schlag acknowledges that Francis argues here from a moral point of view and not from an economic perspective: "This is the moral value Pope Francis aims at: social concern in business decisions."<sup>586</sup> On economic matters, Francis "has made it clear that his teaching in this area is intended to be seen as part and parcel of the Catholic Church's established teachings."<sup>587</sup> Francis himself is clear that "the Church 'cannot and must not remain on the side-line in the fight for justice' and the most suitable tool on the subject is found in the Compendium of the Social Doctrine of the Church." (EG 183-84)

### **5.2.1 Francis and the Continuity of the Teaching of the Church on Economic Matters**

When Pope Francis opposes or criticizes the economy of exclusion, he is in line with the social tradition of the Church and his predecessors. Our study in this section will deal with the analysis of the selective documents of the social teaching of the Church, which he cites in chapter four of EG, which are considered by several theologians as the roadmap of his pontificate. Chapter four of EG is entitled "The Social Dimension of Evangelization." The documents on the social question selected are: The Encyclical Letter *Populorum Progressio* (1967), the Apostolic Letter *Octogesima Adveniens* (1971), the Compendium of the Social Doctrine of the Church (2004), the Encyclical Letter *Deus Caritas Est* (2005), and the Encyclical Letter *Caritatis in Veritate* (2009). The purpose of this section is to show the continuity between what Pope Francis says about economic matters and that of his predecessors.

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<sup>586</sup> Ibid., 105.

<sup>587</sup> Rourke, 168. Also see Daniel Schwindt, *Catholic Social Teaching: A New Synthesis. Rerum Novarum to Laudato Si'* (Lexington, KY: Agnus Dei, 2015), 113-16.

### ***5.2.1.1 Francis and Paul VI on Integral Development and the Free Trade Concept***

One of the most influential writings on integral development after Vatican II is *Populorum Progressio* (PP hereafter), an encyclical letter issued by Paul VI on March 26, 1967. Pope Francis refers to it three times in chapter four of EG. PP highlights care for the poor and gives special attention to poorer nations and international justice. What is said about the care for the poorer nations in *Populorum Progressio* is also found in the apostolic letter *motu proprio, Catholicam Christi Ecclesiam* issued the same year by Paul VI to establish the Council of the Laity and the Pontifical Commission for the Study of Justice and Peace. The aim of the Pontifical Commission was to remind the people of God of their mission today, especially to further the progress of poorer nations and international social Justice (PP 5).

In the first part of his encyclical, Pope Paul VI gives an overview of the problem of worldwide underdevelopment.<sup>588</sup> He begins by making mention of the wide gap between rich and poor nations. Moreover, he points out the signs of social agitation among the poorer social classes, which is spreading at the same time as industrial development around the world (n° 8-9). For these previous reasons, the Catholic Church is invited to follow the steps of Jesus Christ who preached the Good News to the poor as a sign of his mission (PP 12).

Pope Francis refers to PP 14 when he establishes the relationship between Good News and social life. There should be a relationship between the reading of Scripture and social life because our loving response to God should not be seen simply as “an accumulation of small personal gestures to individuals in need, a kind of “charity à la carte”, or a series of acts aimed solely at easing our conscience. The Gospel is about the

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<sup>588</sup> Allan Figueroa Deck, “Commentary on Populorum progression (On the Development of Peoples),” in *Modern Catholic Social Teaching: Commentaries and Interpretations* (Washington: Georgetown University Press, 2005), 292.

kingdom of God (cf. Lk 4:43); it is about loving God who reigns in our world.” (EG 180)  
For Pope Francis, integral development should be the principle of discernment that must be applied to true development, which is “directed to “all men and the whole man”” (PP 14, EG 181).

Speaking about the use of private property, Paul VI stresses the duty of the rich towards the poor. Above all, giving to the poor is giving back what belongs to them as the Fathers of the Church perceived. It reads as follows:

Everyone knows that the Fathers of the Church laid down the duty of the rich toward the poor in no uncertain terms. As St. Ambrose put it: “You are not making a gift of what is yours to the poor man, but you are giving him back what is his. You have been appropriating things that are meant to be for the common use of everyone. The earth belongs to everyone, not to the rich.” (PP 23)

Pope Paul VI also quotes his predecessors when he highlights the fact that nations, which are poorer in economic goods have wisdom to offer to the rich nations. He also notes the riches coming from the cultural traditions that we can find in both poorer and richer nations. He mentions the temptations posed by the wealthier nations to the poorer ones to make temporal prosperity their main pursuit (PP 40-41). Similarly, the Pope suggests that the superfluous wealth of the rich nations might be given to the poor. For him, the continuing avarice of the wealthy nations will arouse the judgement of God and the anger of the poor. For this reason, Pope Paul VI suggests solidarity with the poorer nations (PP 49)

Talking about equity between rich and poor nations, Pope Paul VI acknowledged the effort that had been made to help the developing nations but that there is a risk that this effort might be useless if there are unfair trade relations between the rich and the poor (PP 56). The criticism of the concept of free trade already appeared in the following terms:

It is evident that the principle of free trade, by itself, is no longer adequate for regulating international agreements. It certainly can work when both

parties are about equal economically; in such cases it stimulates progress and rewards effort. That is why industrially developed nations see an element of justice in this principle. But the case is quite different when the nations involved are far from equal. Market prices that are freely agreed upon can turn out to be most unfair (PP 58).

Pope Paul VI acknowledges that Pope Leo XIII already raised the problem in RN when speaking about the just wage for the workers. It is read:

The teaching set forth by our predecessor Leo XIII in *Rerum Novarum* is still valid today: when two parties are in very unequal positions, their mutual consent alone does not guarantee a fair contract; the rule of free consent remains subservient to the demands of the natural law. (57) In *Rerum Novarum* this principle was set down with regard to a just wage for the individual worker; but it should be applied with equal force to contracts made between nations: trade relations can no longer be based solely on the principle of free, unchecked competition, for it very often creates an economic dictatorship. Free trade can be called just only when it conforms to the demands of social justice (PP 59).

In this perspective, Paul VI suggests the principle of solidarity as a goal to be achieved for human development. Francis refers to it as follows: “We need to grow in a solidarity, which “would allow all peoples to become the artisans of their destiny”, since “every person is called to self-fulfilment”.” (PP 65, 15, EG 190). Francis also refers to PP when he analyses the relationship between the principles of the common good and peace in society. Peace is not only an absence of warfare, but it is also based on the efforts directed day after day to establish a perfect justice and the distribution of wealth (PP 76, EG 219).

Describing development as a new name for peace, Pope Paul VI calls for effectiveness and generosity in the charity of rich nations towards the poor. He calls for a fight against material poverty and the unfair conditions of the poor in order to promote not only man’s spiritual development but also man’s moral development, which is of benefit to the whole human race. Pope Paul VI states clearly that the extreme disparity between nations can provoke jealousy and discord. It can also jeopardize peace. The mission of the Church is to fight poverty, which implies spiritual and moral development.



Peace is not only the absence of warfare, but it is above all a perfect form of justice among men and women (PP 76)

Finally, Pope Paul VI invites educators to inspire young people to help the needy nations as well as encouraging the media to promote mutual aid for the poor. It helps to be aware of the spectacle of misery and poverty. It also highlights the fact that wealthy nations tend to ignore them when the poor stand outside their doors waiting to receive some leftovers from the banquets (PP 83). The originality of *Populorum Progressio* consists not only in the idea of integral development but also in the issue of asymmetrical power relations in the quest for development. True human development goes beyond economic criteria, it implies ongoing humanization.<sup>589</sup>

Pope Francis also refers to the Apostolic Letter *Octogesima Adveniens*. On the eightieth anniversary of *Rerum Novarum* (14 May 1971), Pope Paul VI wrote the Apostolic Letter *Octogesima Adveniens (OA)* to the Chairman of the Council of the Laity and of the Pontifical Commission for Justice and Peace, Cardinal Maurice Roy. The intention of the Pope was not only to commemorate the anniversary of *Rerum Novarum* but also to inspire social justice to action (OA 1). This apostolic letter was dominated by questions of justice such as social justice solidarity, and peace.

Pope Paul VI responded to the aspirations of the whole world for justice. He states: “From all sides there rises a yearning for more justice and a desire for a better guaranteed peace in mutual respect among individuals and peoples.” (OA 2) Nevertheless, the pontiff acknowledges that the Church cannot provide solutions to all social questions. Pope Francis refers to it in EG in the following terms:

Neither the Pope nor the Church have a monopoly on the interpretation of social realities or the proposal of solutions to contemporary problems. Here I can repeat the insightful observation of Pope Paul VI: “In the face of such

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<sup>589</sup> Allan Figueroa Deck, “Commentary on *Populorum Progressio* (On the Developments of Peoples),” 305.

widely varying situations, it is difficult for us to utter a unified message and to put forward a solution which has universal validity. This is not our ambition, nor is it our mission. It is up to the Christian communities to analyse with objectivity the situation which is proper to their own country” (OA 4, EG 184)

Concerning the poor, Pope Paul VI speaks about what he calls the ‘new poor’ who are the victims of change. He describes them as “the handicapped and the maladjusted, the old, different groups of those on the fringe of society.” (OA 15) It is to them that the Church directs her attention “in order to recognize them, help them; defend their place and dignity in a society hardened by competition and the attraction of success.” (OA 15) The Pope views this commitment of the Church to the poor as concrete action inspired by the Gospel.

Inspired by the Gospel, pope Paul VI calls for solidarity of the most fortunate with those who are poor. Referring to it, pope Francis remarks that the planet belongs to all humankind and it is not because people are born in places with fewer resources or less development that they cannot live with dignity. Along the same line as his predecessors, Francis states:

It must be reiterated that “the more fortunate should renounce some of their rights so as to place their goods more generously at the service of others”. [155] To speak properly of our own rights, we need to broaden our perspective and to hear the plea of other peoples and other regions than those of our own country. We need to grow in a solidarity which “would allow all peoples to become the artisans of their destiny”, [156] since “every person is called to self-fulfilment” (EG 190)

To sum up, Francis’ references to *Populorum Progressio* and *Octogesima Adveniens* have shown that solidarity and equity are the most promoted values by Pope Paul VI in these two documents. Solidarity of the wealthy nations with the poorer helps to reduce economic disparity between prosperous nations and poor ones. Even though *Octogesima Adveniens* could be considered by some theologians as a continuation of *Populorum progressio*, Christine E. Gudorf notes a shift from analysis of social injustice to methods for addressing that injustice. *Octogesima Adveniens* insists on the creation of

the just society by participation of all, including the poor who may not be just the recipients of justice.<sup>590</sup> Another main document of the Social Teaching of the Church that Francis refers to is the Compendium of the Social Doctrine of the Church (hereafter CSDC). The next section will focus on the analysis of Francis' references to this document in chapter four of EG.

### **5.2.1.2 Pope Francis and CSDC (2004)**

Speaking about Pope Francis' continuity with the Social Teaching of Church, the Jesuit Thomas Massaro recalls an interview given by Francis about his social teaching in EG: "In the Exhortation (EG) I did not say anything that is not already in the teachings of the social doctrine of the church."<sup>591</sup> The CSDC was launched in Rome in October 2004 by Cardinal Martino then President of the Pontifical Council for Justice and Peace.<sup>592</sup> In the same document is found the meaning and the purpose of CSDC:

This document offers a complete overview of the fundamental framework of the doctrinal corpus of Catholic social teaching. This overview allows us to address appropriately the social issues of our day, which must be considered as a whole, since they are characterized by an ever-greater interconnectedness, influencing one another mutually and becoming increasingly a matter of concern for the entire human family. The exposition of the Church's social doctrine is meant to suggest a systematic approach for finding solutions to problems, so that discernment, judgment and decisions will correspond to reality, and so that solidarity and hope will have a greater impact on the complexities of current situations (CSDC 9).

Pope Francis refers to CSDC 9 by inviting the Church's pastors to draw the practical conclusion from the social teaching so that it might impact reality (EG 182). Francis underlines the interconnectedness of the proclamation of the Good News and the

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<sup>590</sup> Christine E. Gudorf, "Commentary on Octogesima Adveniens (On the Eightieth Anniversary of Rerum Novarum)" in *Modern Catholic Social Teaching: Commentaries and Interpretations* (Washington: Georgetown University Press, 2005), 323.

<sup>591</sup> Thomas Massaro, *Mercy in Action: The Social Teachings of Pope Francis* (London: Rowman & Littlefield, 2018), 33.

<sup>592</sup> Padraig Corkery, *Companion to the Compendium of the Social Doctrine of the Church* (Dublin: Veritas, 2007), 7. Also see, Bishop Raymond Field, "Foreword," in *The Common Good in an Unequal World*, ed. EOIN G. Cassidy (Dublin: Veritas, 2007), 13.

social reality. For example, Francis refers to CSDC 52 which is on the Church, the Kingdom of God and the renewal of social relations. It reads as follows:

God, in Christ, redeems not only the individual person but also the social relations existing between men. As the Apostle Paul teaches, life in Christ makes the human person's identity and social sense — with their concrete consequences on the historical and social planes — emerge fully and in a new manner: “For in Christ Jesus you are all children of God, through faith. For as many of you as were baptized into Christ have put on Christ. There is neither Jew nor Greek, neither slave nor free, there is neither male nor female; for you are all one in Christ” (Gal 3:26-28). In this perspective, Church communities, brought together by the message of Jesus Christ and gathered in the Holy Spirit round the Risen Lord (cf. Mt 18:20, 28:19-20; Lk 24:46-49), offer themselves as places of communion, witness and mission, and as catalysts for the redemption and transformation of social relationships (CSDC 52).

When speaking about the social teaching of EG, Pope Francis refers to the CSDC as a suitable tool to analyse the social questions (EG 184). For Massaro, Pope Francis “(in a fit of modesty) downplays the social teaching content of his own document and steers the reader to another church publication (a reference work titled *The Compendium of the Social Doctrine of the Church*, published by the Holy See over a decade earlier).”<sup>593</sup> Defending the inclusion of the poor in society, Pope Francis also refers to CSDC 157 to support his arguments. This extract from the CSDC argues in favour of the rights of people and nations, which are enshrined in international law on human rights. On this, stands peace for the whole world and that is why the cry of entire peoples, the poorest peoples of the earth, should be heard (EG 190).

### ***5.2.1.3 Francis and Benedict XVI: Role of the Church in the Public Space***

Pope Francis refers to the Encyclical letter, *Deus Caritas Est on Christian love* (DCE hereafter)<sup>594</sup> when he establishes the relationship between the Church’s social teaching and social questions (EG 182-86). Pope Benedict XVI’s DCE was issued on the 25th of December 2005. This Encyclical analyses the various dimensions of love. There are three

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<sup>593</sup> Massaro, *Mercy in Action*, 33.

<sup>594</sup>

dimensions of love. The first and the second dimensions are love as *eros* and *philia*, Greek words referring to love or friendship. The third dimension is love as *agapè*, another Greek word referring to the Christian understanding of love. The figure symbolised by love as *agapè* is Jesus. He is the love of God incarnate. The love of God finds its culmination in him. According to Benedict XVI, the neighbour is understood to be a poor person in need (DCE 15). Although in this case, he is referring to all humankind, the concept of the neighbour remains concrete. The word neighbour calls for individual commitment. The duty of the Church is to interpret anew human relationship in daily life using the Last Judgement (Mt 25:31-46) as the criterion. For Benedict XVI, “Love of God and love of neighbour have become one: in the least of the brethren we find Jesus himself, and in Jesus we find God” (DCE 15).

Love of neighbour is the responsibility of each individual member of the faithful and of the Church. The Church should practice and organise love for the service of the community so that there is no longer a distinction between rich and poor (DCE 20). The Pope notes that charity has been constitutive of the Good News since the beginning of the Church. Charles M. Murphy remarks that Pope Benedict XVI resurrects a term from social teaching not heard of since the 1971 World Synod of Bishops.<sup>595</sup> Pope Benedict XVI recalls some of the earliest legal structures associated with the service of charity in the Church. It was called *diaconia* (DCA 23). Talking about the relationship between justice and charity, Pope Benedict XVI notes the objection since the nineteenth century to the Church’s charitable activity. It is said that the poor do not need charity but justice (DCE 26).

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<sup>595</sup> Charles M. Murphy, “Charity, not Justice, as constitutive of the Church’s mission,” in *Theological Studies*, 68 (2007), 274.

Pope Benedict XVI acknowledges that throughout history the Church's leaders were slow to understand that the struggle against poverty should be done in a new way until Leo XIII presented it in *Rerum Novarum*. It reads as follows:

It must be admitted that the Church's leadership was slow to realize that the issue of the just structuring of society needed to be approached in a new way. There were some pioneers, such as Bishop Ketteler of Mainz († 1877), and concrete needs were met by a growing number of groups, associations, leagues, federations and, in particular, by the new religious orders founded in the nineteenth century to combat poverty, disease and the need for better education. In 1891, the papal magisterium intervened with the Encyclical *Rerum Novarum* of Leo XIII (DCE 27).

Pope Francis refers to DCE 28 where Pope Benedict XVI notes the important role of the Church in the public space. Francis argues that nobody can claim “to lock up in a church and silence the message of Saint Francis of Assisi or Blessed Teresa of Calcutta” (EG 183). For Pope Francis an authentic faith always involves a deep desire to change the world. Even though the church should not take on political battles herself, she “must not remain on the side-lines in the fight for justice” (DCE 28)

Pope Francis also refers to the Encyclical Letter *Caritas in Veritate on integral human development in Charity and Truth* (CV hereafter) written by Pope Benedict XVI and issued on the 29th of June 2009. Forty-two years after *Populorum Progressio* of Pope Paul VI, Pope Benedict XVI intends through this Encyclical Letter to pay tribute to his predecessor and to honour his memory by revisiting his teaching on integral human development (CV 8).

Pope Francis refers to CV 2, which defines charity as the central core of the Church's teaching. He quotes this number to encourage Christians to be involved in politics because there is an interconnection between the vocation of the politician, which is one of the highest forms of charity and the search for the common good. Pope Francis states:

I ask God to give us more politicians capable of sincere and effective dialogue aimed at healing the deepest roots – and not simply the appearances

– of the evils in our world! Politics, though often denigrated, remains a lofty vocation and one of the highest forms of charity, inasmuch as it seeks the common good.[174] We need to be convinced that charity “is the principle not only of micro-relationships (with friends, with family members or within small groups) but also of macro-relationships (social, economic and political ones)”.[175] I beg the Lord to grant us more politicians who are genuinely disturbed by the state of society, the people, the lives of the poor! It is vital that government leaders and financial leaders take heed and broaden their horizons, working to ensure that all citizens have dignified work, education and healthcare (EG 205).

Francis’ quotation is along the same line as Benedict XVI who recalls, as did his predecessor John Paul II, that the demarcation line between rich and poor countries is not as clear as it was at the time of Pope Paul VI. He observes that new sectors of society are succumbing to poverty and that there is a new form of poverty (CV 22). Presenting the situation of development in our time, Benedict XVI highlights the issue of material poverty in many poor countries. What matters is not the shortage of material resources to feed the whole world but that a network of economic institutions is required to tackle the problem. The Pope sheds light on the plight of many poor countries and denounces the situation of food shortages. He remarks, like his predecessors, that people are still living in hunger and, like Lazarus, they are not permitted to take their place at the rich man’s table. For him, it is an ethical imperative for the Church to feed the hungry. Doing so is to follow the teachings of Jesus about solidarity and the sharing of goods. For him, it is shocking that the world continues to tolerate injustices “while the poor of the world continue knocking on the doors of the rich.” There is a risk that the world of affluence does not hear those knocks, “on account of a conscience that can no longer distinguish what is human.” (CV 75)

To sum up, Francis’ statements on economic matters reiterate what is already found in Church Social Doctrine. Thomas R. Rourke formulates the following answer to those who accuse Francis of being a Marxist:

Concerning those who called him a Marxist because he referred to an economy that “kills,” Pope Francis suggests that “perhaps whoever has made

this comment does not know the social doctrine of the Church and, apparently, does not even know Marxism very well either.” Anyone who thinks the Pope’s language is too strong might wish to reread Pius XI’s discussion of the economic liberalism of his day, which he characterized as a “despotic economic dictatorship...in the hands of a few,” where “no one can breathe against their will”<sup>596</sup>

Michelle Dillon echoes this in other words and summarizes in clear expressions what has been said in this section. In other words, Pope Francis’ criticism of an economy of exclusion is just an additional step to translate the Social Teaching of Church for today’s post-secular world.<sup>597</sup> For Dillon,

Francis clearly accomplishes this. His critique is anchored in Christian faith—literally, in the joy of the gospel (the title of his exhortation), and a “mission focused on Jesus Christ and...commitment to the poor” (JG 97). These faith principles have long been translated into Catholic social teaching (e.g., solidarity, just wages). Francis takes an additional step and translates these values into a highly secular and plain-spoken vocabulary.<sup>598</sup>

Even though Pope Francis’ critique is just an additional step to translate the social teaching of the Church, his answer is not heard enough to stop the list of criticisms, which abound within the church when it comes to the master of the reform of the Roman Curia. This issue of a curia reform is explored in the next section.

### **5.3 REFORM OF THE CURIA UNDER FRANCIS AND OUTRIGHT OPPOSITION**

For the French theologian Hervé Legrand, the Catholic Church entered into a new era with Pope Francis. The pontificate of Benedict XVI had been dominated by many scandals in the curia, which were humiliating for the Pope and troubling for public opinion.<sup>599</sup> As a result, Francis started his papacy with a strong desire for a moral and

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<sup>596</sup> Rourke, *The Roots of Pope Francis’s Social and Political Thought*, 190. He quotes Tornielli and Galeazzi, *This Economy Kills*, 151 and Pius XI, *Quadragesimo anno*, 105-6. Also see Inès San Martín, “Pope Francis and Cardinal Marx deliver contrasting takes on Marxism,” in *The Irish Catholic*, May 10, 2018, 23.

<sup>597</sup> Michelle Dillon, *Postsecular Catholicism: Relevance and Renewal* (Oxford: Oxford University Press, 2018), 43.

<sup>598</sup> *Ibid.*

<sup>599</sup> Hervé Legrand, “Enjeux ecclésiologiques des réformes institutionnelles envisagées pas le pape François” in *Le Grand tournant : L’an I de la révolution du pape François* (Paris : Cerf, 2014), 185.



managerial reform of the curia.<sup>600</sup> This initiative earned the revealing title of a book entitled “François parmi les loups”<sup>601</sup>, which perfectly characterises the internal opposition to his reforms.<sup>602</sup> At the outset of his papacy, Francis refused to live in the pontifical apartments, and his decision revealed not only a new lifestyle closer to the poor, but it was also a strong signal sent to his collaborators, what Legrand calls “un style de vie plus évangélique”.<sup>603</sup> As Christopher Lamb asserts, “the 266<sup>th</sup> successor to St Peter has made the decision to live simply in the Casa Santa Marta guest-house, to be driven in an unassuming Ford and to retain close connections with a wide range of people outside the traditional Vatican bureaucracy.”<sup>604</sup> Massimo Faggioli also describes it in the following terms: “Francis’ distance from the curia is not just a matter of words but also of style of governing the church.”<sup>605</sup>

The famous speech about the fifteen ailments of the Roman Curia in December 2014 illustrates the determination of Francis to revive the curia and to bring the Church closer to the poor. The reform undertaken by Francis saw the emergence of two camps in the Vatican: the conservatives opposed to Francis and the progressive supporters of the Pope as if the central government of the Catholic Church had become a political party. This section will try to shed light on Pope Francis’ reform of the Roman Curia. It will be guided by a double question: firstly, what kind of Roman Curia does Pope Francis want? Secondly, what kind of Church does he dream of and struggle for? To understand the

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<sup>600</sup> Also see Michel Cool, *François : Pape du Nouveau Monde* (Paris : Salvator, 2013), 37-8.

<sup>601</sup> It is a title of a book published in Italian by the journalist of *La Repubblica* Marco Politi and translated in French (Marco Politi, *François parmi les loups* (trans. Samuel Sfez; Paris: Philippe Rey, 2015). Also see Marco Politi, “Choppy waters for the ship of St Peter,” in *The Tablet*, 6 January 2018, 4. Also see Evangelina Himition, *François: Un Pape Surprenant* (Trans. Lorraine de Plunkett; Paris: Renaissance, 2013). Gianluigi Nuzzi, *Chemin de Croix : François, un pape en danger au cœur du Vatican* (Paris : Flammarion, 2015).

<sup>602</sup> Also see Richard Gaillardetz, “Francis under fire” in *The Tablet*, 22 September 2018, 4-5.

<sup>603</sup> Legrand, “Enjeux ecclésiologiques des réformes institutionnelles envisagées par le pape François,” 186.

<sup>604</sup> Christopher Lamb, “Reviving the spirit of Reform,” in *The Tablet*, 10 March 2018, 4.

<sup>605</sup> Massimo Faggioli, “Curia” in *Key Words of Pope Francis* (Joshua J. McElwee and Cindy Wooden, eds; London: Bloomsbury Continuum, 2018), 36.

kind of reform Pope Francis is undertaking for the Roman Curia, this research will firstly highlight some changes in the Roman Curia initiated by Francis. Secondly, it will analyse some selected extracts from Francis' address to the Roman Curia on Monday, 22 December 2014 during the presentation of the Christmas greetings.<sup>606</sup> Thirdly, I will point out Francis' ecclesiology behind the critical reform.

Firstly, Francis' decision to bring new energy into the Roman Curia came when

four weeks after his election, on April 13, 2013, Pope Francis announced the creation of a 'council of cardinals,' an advisory panel on church governance made up of eight cardinals (the "C-8" coming from all inhabited continents and with a significant reduction of the Italian and curial presence (...) until the inclusion in the "C-9" of Secretary of State Cardinal Pietro Parolin in July 2014.<sup>607</sup>

For Massimo Faggioli, it is a sign that the centralisation of the papal authority is over. It expresses also the new face of the Roman Curia as the cardinals are chosen from different continents.<sup>608</sup> The C-9 is not the only institution that Francis has placed above the Roman Curia but the decision to convoke, "in October 2013, an extraordinary synod with celebration in 2014 and an ordinary synod in 2015 (both on the topic of family), signalled a change in the hierarchy of institutions of church government: pope, curia, episcopate."<sup>609</sup> Other explicit signs of the reform of the curia are the Apostolic Letter issued *Motu Proprio Fidelis Dispensator et Prudens* to establish a new coordinating agency for the economic and administrative affairs of the Holy See and the Vatican State,

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<sup>606</sup> Pope Francis, "Presentation of the Christmas Greetings to the Roman Curia," available at [https://w2.vatican.va/content/francesco/en/speeches/2014/december/documents/papa-francesco\\_20141222\\_curia-romana.html](https://w2.vatican.va/content/francesco/en/speeches/2014/december/documents/papa-francesco_20141222_curia-romana.html) (accessed 10/04/2018).

<sup>607</sup> Massimo Faggioli, "The Roman Curia at and after Vatican II: Legal-Rational or Theological Reform?" in *Theological Studies*, 2015, Vol. 76 (3), 568. For the French theologian Hervé Legrand, the first revolutionary decision came the day Pope Francis was elected because instead of giving the blessing *urbi et orbi* to the people of God, he asked first the people of God to pray for him. Legrand states : "Le premier geste du Pape François nullement improvisé, est instructif. Au lieu de commencer par donner sa première bénédiction *urbi et orbi*, comme on s'y attendait, il a surpris les fidèles en se confiant au paravent à leur prière. Il renoue ainsi avec la compréhension traditionnelle et non pas cléricale, du peuple de Dieu tel que *Lumen Gentium* l'a reprise." (Legrand, 187)

<sup>608</sup> Ibid. Also see Michael Collins, "Pope Francis: Architect of Reform." In *The Francis Factor: A New Departure* (Dublin: The Colomba, 2014), 150-56.

<sup>609</sup> Ibid.

and also the creation of the Pontifical Commission for the protection of Minors in the Church.

For Eugene Duffy, the creation of the C-9 by Pope Francis is “an unprecedented move” because “Popes have for a long time relied on the cardinals of the Curia to advise them. Until relatively recently these were mostly European, generally Italian.”<sup>610</sup> Duffy notes that at Vatican II there was a call for the internationalisation and the decentralisation of the curia. He states:

Paul VI resisted a reform of the College of Cardinals and he also resisted the proposal of Cardinal Döpfner of Munich to establish a central council of bishops, elected by their episcopal conferences, above the Curia, who would advise the pope in his governance of the Church. Paul VI avoided both a reform of the Curia and this central council of bishops and created the Synod of Bishops instead as an advisory body.<sup>611</sup>

Duffy points out that Francis’ reform of the Roman Curia is a significant one because since Vatican II the Catholic Church never experienced such changes even during the pontificate of John Paul II and Benedict XVI. For him, the problems inherited by “Francis are a direct result of the conciliar reforms having never been properly implemented.”<sup>612</sup> Pope Francis’ experience as Provincial Superior of the Jesuits in Argentina helps him because he was familiar with the advantages of a provincial council. Duffy views this as lessons to be learned from “the experience of religious orders as to how governance can be better exercised in a more collegial spirit. Religious orders offer a well-tested alternative to an over reliance on monarchical models of governance and are much closer to the expressions of collegiality affirmed by Vatican II.”<sup>613</sup>

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<sup>610</sup> Eugene Duffy, “Go, Francis, and Repair my Church,” in *Doctrine & Life*, Vol. 64, No. 6 (July-August 2014), 4.

<sup>611</sup> *Ibid.*

<sup>612</sup> *Ibid.*

<sup>613</sup> *Ibid.*, 5.

Secondly, Francis' reform of the curia, (which he considered as a complex body) intends to make it a dynamic one and like the Church understood as 'Mystical Body of Christ'.<sup>614</sup> For Francis,

the Roman Curia is a complex body, made up of number of Congregations, Councils, Offices, Tribunals, Commissions, (...) which do not all have the same task but are coordinated in view of an effective, edifying, disciplined and exemplary functioning, notwithstanding the cultural, linguistic and national differences of its members.<sup>615</sup>

In the perspective of growth in communion and wisdom, Pope Francis lists fifteen diseases of the Roman Curia. His intention is to help his members in their process of personal conversion. Even though, Francis' intention was to provide some guidelines for the examination of conscience for cardinals before the Christmas' confession, one can also draw from the disease listed how the Holy Father would like to see the Roman Curia and the strategies for his pastoral discernment and reform of the Roman Curia. For example, Pope Francis criticises the pathology of power and the superiority complex in the following terms

It is the disease of the rich fool in the Gospel, who thought he would live forever (cf. Lk 12:13-21), but also of those who turn into lords and masters and think of themselves as above others and not at their service. It is often an effect of the pathology of power, from a superiority complex, from a narcissism which passionately gazes at its own image and does not see the image of God on the face of others, especially the weakest and those most in need. [8]<sup>616</sup>

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<sup>614</sup> Ibid.

<sup>615</sup> Ibid.

<sup>616</sup> Ibid., no 1. It should be mentioned here the strong language used by Francis during his meeting in Dublin on August 25<sup>th</sup>, 2018 with the survivors of physical and clerical sexual abuse in Ireland. To describe those who covered up the scandal, Francis used the term 'caca' meaning excrement. For Christopher Lamb, "his apology on Sunday (August 26<sup>th</sup>) was one that he had drafted mid-trip after meeting survivors on Saturday evening." (Christopher Lamb, "Under Siege in a Changed Land," in *The Tablet*, 1 September 2018, 4.) After asking forgiveness, Francis expressed his commitment to tackle corruption in the Church and to have zero tolerance for such abuses. Nevertheless, Pope Francis' visit was also overshadowed by "a devastating memo (...) from Archbishop Carlo Maria Viganò, a former papal ambassador to the United States, alleging that Francis had been told about the sexual misconduct claims against former Cardinal Theodore McCarrick, and calling on him to resign (...) Francis told reporters on his in-flight press conference on his return to Rome: 'I will not say a single word' about Archbishop Viganò's 11-pages testimony." (Ibid.) Also see Christopher Lamb, "Culture wars," in *The Tablet*, 8 September 2018, 4.

From this quote, several elements emerge, which can enable the readers to detect what kind of Roman Curia Pope Francis wants. The Roman Curia must be at the service of all, especially the weakest and most needy. Pope Francis refers to his Apostolic Exhortation EG 197-201. These five numbers from EG are dedicated to the special place of the poor amongst God's people. Pope Francis invites his colleagues not to be blinded by power because by being corrupted by power, they will have no room for the poor. Pope Francis is very clear when he affirms that "No one must say that they cannot be close to the poor because their own lifestyle demands more attention to other areas. This is an excuse commonly heard in academic, business or professional, and even ecclesial circles." (EG 201)

To the disease of power, Pope Francis adds other sicknesses such as: the disease of rivalry and vainglory, the disease of existential schizophrenia, "which often strikes those who abandon pastoral service and restrict themselves to bureaucratic matters."<sup>617</sup> For Francis,

"Life grows by being given away, and it weakens in isolation and comfort. Indeed, those who enjoy life most are those who leave security on the shore and become excited by the mission of communicating life to others". [4] When the Church summons Christians to take up the task of evangelization, she is simply pointing to the source of authentic personal fulfilment (EG 10).

Francis invites his collaborators to conversion, which is the attitude of the missionary heart as it emerges from his EG: "A missionary heart is aware of these limits and makes itself "weak with the weak... everything for everyone" (1 Cor 9:22). It never closes itself off, never retreats into its own security, never opts for rigidity and defensiveness" (EG 45).

Thirdly, Francis wants the Roman Curia to look like the Mystical Body of Christ, which is the Church. Marco Politi, the author of "Francis among the wolves" emphasizes

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<sup>617</sup> Ibid., no 7-8.

that Francis' revolution has a name that he designates by the expression "missionary transformation of the Church."<sup>618</sup> Politi also remarks that Pope Francis announced his intentions to reform the Church in EG. He states: "Pastoral ministry in a missionary key seeks to abandon the complacent attitude that says: "We have always done it this way". I invite everyone to be bold and creative in this task of rethinking the goals, structures, style and methods of evangelization in their respective communities." (EG 33) Assessing the first five years of Francis' papacy, Michael Kelly, the editor of *The Irish Catholic* also notes that

In his landmark apostolic exhortation *Evangelii Gaudium*, Francis sets out a vision of the Church that is more decentralised. A Church where the relationship between the centre (Rome) is balanced with the local Church. This model was the one envisaged by the Second Vatican Council in the 1960s that sought to realise the idea of collegiality – that the Pope and bishops govern the Church together.<sup>619</sup>

Pope Francis has tried to put into practice synodality, which implies a dialogue between bishops, priests and the people of God coming together to discuss the needs of the Church and discern strategies to meet those needs.<sup>620</sup> Nevertheless, there have been some misunderstandings about the meaning of the concept of synodality and its application as some have confused it with "a democracy where everything – including core teaching – is up for grabs."<sup>621</sup> Pope Francis understood that authentic reform in the Church does not come by being imposed from the top down but from the periphery, from

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<sup>618</sup> Politi, *François parmi les loups*, 192. Also see the book of Clemens Sedmak where he describes Pope Francis' papacy as a "transforming orthodoxy" in the sense that Francis invites the Church to move beyond "moral and doctrinal temptations, such as the moral temptation of self-righteousness and the doctrinal temptation to see revelation as a possession that can be fully controlled." (Clemens Sedmak, *A Church of The Poor: Pope Francis and the Transformation of Orthodoxy* (Maryknoll, NY: Orbis, 2016), 169.)

<sup>619</sup> Michael Kelly, "The Francis revolution at five," in *The Irish Catholic*, March 15, 2018, 2.

<sup>620</sup> Ibid. This also appears in the *Instrumentum Laboris* for the synod 2018: "The Preparatory Document included a Questionnaire, mainly addressed to Bishops' Conferences, to the Synods of Eastern Catholic Churches and to other ecclesial bodies, with fifteen questions for everybody and three specific questions for each continent, as well as a request to share three "best practices". XV ORDINARY GENERAL ASSEMBLY OF THE SYNOD OF BISHOPS, Young People, the Faith and Vocational Discernment, online: <http://www.synod2018.va/content/synod2018/en/fede-discernimento-vocazione/instrumentum-laboris-for-the-synod-2018--young-people--the-faith.html> (Accessed 24/10/2018)

<sup>621</sup> Ibid.

people discerning together.<sup>622</sup> This intention is clearly expressed in EG where Francis recalls that “the papacy and the central structures of the universal Church also need to hear the call to pastoral conversion.” (EG 32) It is what the theologian Hervé Legrand calls a reform of the Roman Curia guided by the ecclesiology of communion as it reconsiders the relationship between authority and communion.<sup>623</sup> However, this reform is not to the taste of all particularly in Vatican circles where some collaborators of Pope Francis believe that it is very liberal. Legrand underlines that the Canon Law of 1983 has concentrated all the powers in the hands of the ordained ministers of the Church particularly the pope, bishops and parish priests. This could be one of the obstacles for Pope Francis’ reforms. For Legrand,

Les reformes vont se heurter à tous les registres, à la lettre de l’esprit du droit en vigueur qui a désarticulé la relation entre l’autorité et la communion. C’est ainsi que le code revissé de 1983 a veillé systématiquement à ce que les détenteurs de l’autorité (pape, évêques et curés de paroisse à leur échelle) puissent exercer souverainement tous les pouvoirs de leur charge, c’est-à-dire sans interférence de la part des autres fidèles. Selon le Code, pape et évêques cumulent, cumulent en termes séculiers, le pouvoir législatif, exécutif et judiciaire, auquel s’ajoute le pouvoir magistériel. Le mode de gouvernement est généralement de prégnance absolutiste, ce qui soulève d’importantes questions pastorales, œcuméniques et théologiques.<sup>624</sup>

Legrand argues for a reform in the spirit of the Dogmatic Constitution on the Church, *Lumen Gentium* where the Church is conceived and understood as the people of God with a triple trinitarian model of the people of God as Father, as the body of Christ and as the temple of the Holy Spirit.<sup>625</sup> This implies putting into practice synodality and collegiality. In addition, Legrand also argues in favour of the consultation of the people of God before appointing bishops because doing so expresses communion in the Church.

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<sup>622</sup> Ibid.

<sup>623</sup> Legrand, 190.

<sup>624</sup> Ibid., 190-91.

<sup>625</sup> Ibid., 191.

Talking about Francis' reform, Christopher Lamb acknowledges that Francis is living with 'contradiction' as

since the Council (Vatican II), some have refused to recognise the new spring and have demanded the restoration of a mystical pre-conciliar golden era. Others, like civil servants faced with a radically-minded government minister, concede that, yes, the council was important, but it meant no more than business as usual.<sup>626</sup>

Pope Francis is facing opposition in his efforts for a renewed Catholicism based on tenderness and mercy.<sup>627</sup> It could be said that the more troubling for him is the outright opposition from some bishops to his agenda.<sup>628</sup> Marco Politi formulates the resistance to Pope Francis' reforms in the following terms:

There are many reasons for the resistance to Francis's reforms. Some bishops are simply committed theological conservatives, and others stick to tradition because of a temperamental preference for "how it always was"; (...) The same is true of the junior clergy; young priests are often the firmest in their resolve to resist Francis's reforms. Together, these bishops and priests create a sort of marsh, hampering the Pope's progress and slowing down the work of the new bishops he appoints.<sup>629</sup>

To sum up, this study has highlighted not only the different steps taken by Francis to reform the Roman Curia but has also pointed out the ecclesiology that Francis wants. As many theologians have already testified "Francis' pontificate seems to be on many levels, a return to the [views] of Vatican II." Nevertheless, there is still hard work to be done. Massimo Faggioli describes the work ahead with the expression "technical issues"

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<sup>626</sup> Lamb, "Reviving the spirit of Reform," 4.

<sup>627</sup> On September 13, 2018, the Holy Father received in audience the participants in the conference on "The theology of tenderness in Pope Francis" which will take place in Assisi from 14 to 16 September 2018. In his address, Pope Francis defines 'the theology of tenderness' as "the beauty of feeling that one is loved by God, and the beauty of feeling loved in the name of God." (Pope Francis, "Audience with the participants in the Conference on "The theology of tenderness in Pope Francis," accessed: <http://press.vatican.va/content/salastampa/en/bollettino/pubblico/2018/09/13/180913a.html> (Accessed 20/09/2018). He calls it "a theology on the move: a theology that emerges from the narrow alleys to which it is sometimes confined, and that with dynamism turns to God, taking man (the person) by the hand; a non-narcissistic theology, but aimed at the service of the community; a theology that is not content to repeat the paradigms of the past, but that is the *Word incarnate*. Certainly, the Word of God does not change (cf. Heb 1: 1-2, 13,8), but the flesh that it is called to assume, this yes, it changes in every age." The mission of the theology of tenderness is "to incarnate the Word of God for the Church and for mankind (humankind) in the third millennium." (Ibid.)

<sup>628</sup> Ibid.

<sup>629</sup> Marco Politi, "Choppy Waters for the ship of St Peter," in *The Tablet*, 6 January 2018, 5.



and he underlines the need for theology and particularly ecclesiology in the Curia's reform. It is in this sense that he notes that since the Second Vatican Council the Roman Curia has been applying what he calls "a Weberian legal-rational rearrangement of the dicasteries and their procedures, leaving the ecclesiology of Vatican II as an ex-post-justification of the new architecture."<sup>630</sup> For Legrand, there are many other areas that need reforming in the future such as: the relationship between the pontifical primacy and the communion of the Church, and the nomination of bishops. Following the study of the pressures placed on Pope Francis due to his desire to reform the Roman Curia in the spirit of the Church as the people of God, the next section will analyse his moral theology and his controversial pastoral approach to vulnerable families.

#### **5.4 POPE FRANCIS' MORAL THEOLOGY OF VULNERABLE FAMILIES AND THE CONTINUITY OF THE SOCIAL TEACHING OF THE CHURCH**

When Pope Francis talks about vulnerable people, he also mentions vulnerable families (EG 212) and especially family breakdown (AL 46). These vulnerable families are now numerous and, among them, remarried divorcees. It is because the question of the remarried divorcees highlights the situation of vulnerable families that this section will study the various criticisms addressed to Pope Francis following the publication of the Apostolic Exhortation *Amoris Laetitia* and particularly Chapter eight of this document. This study will have three parts: firstly, there will be a brief presentation of the different criticisms, including the debate on the synod of family, and the *dubia* or doubts of the four cardinals. Secondly, one will analyse the moral theology behind the pastoral

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<sup>630</sup> Massimo Faggioli, "The Roman Curia at and after Vatican II: Legal-Rational or Theological Reform?" in *Theological Studies*, 2015, Vol. 76 (3), 550. For the sociologist Max Weber, "Legal-rational authority is empowered by a formalistic belief in the content of the law (legal) or natural law (rationality). (...) the best example of legal-rational authority was a bureaucracy (political or economic)." (See the work of Dana Williams, "Max Weber: Traditional, Legal-Rational, and Charismatic Authority," available at <https://pdfs.semanticscholar.org/da80/1c140dcaa5a33c1ae4ccfd0cd74554765491.pdf> (accessed 24/04/2018)).

approach of Pope Francis based on the different theological reactions to Chapter eight of *Amoris Laetitia*. The third and final point will demonstrate that, beyond various criticisms, Pope Francis' pastoral approach is in continuity with the social teaching of the Church.

#### **5.4.1 Brief Presentation of the Debate on the Synod of Family and *Amoris Laetitia***

*Amoris Laetitia* (hereafter AL) is the result of two synods (extraordinary (2014) and ordinary (2015)) convened by Pope Francis. In the Final Report (FR hereafter) of the second synod one reads: "In the span of two years, the Extraordinary General Assembly (2014) and the Ordinary General Assembly (2015) have undertaken the task of reading the signs of God and human history, in faithfulness to the Gospel." (FR 3). The conclusion of the first extraordinary synod (2014) also called (*Relatio Synodi* (hereafter RS) was entitled "The Pastoral Challenges of The Family in The Context of Evangelization".<sup>631</sup> The FR of the extraordinary synod was entitled "The Vocation and Mission of the Family in The Church and in the Contemporary World."<sup>632</sup>

AL combines the result of the two synods. There are other considerations that Pope Francis suggested for pastoral practices as it appears in the following quote:

I thought it appropriate to prepare a post-synodal Apostolic Exhortation to gather the contributions of the two recent Synods on the family, while adding other considerations as an aid to reflection, dialogue and pastoral practice, and as a help and encouragement to families in their daily commitments and challenges (AL 4).

Some of Francis' pastoral considerations in AL aroused debate and even division among readers. To illustrate this controversy, this section will recount one of the biggest incidences of these controversies. On November 14<sup>th</sup>, 2016 four cardinals submitted a

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<sup>631</sup> The Synod of Bishops, "The Pastoral Challenges of The Family in The Context of Evangelization," available at [www.vatican.va/roman\\_curia/synod/documents/rc\\_synod\\_doc\\_20141018\\_relatio-synodi-familia\\_en.html](http://www.vatican.va/roman_curia/synod/documents/rc_synod_doc_20141018_relatio-synodi-familia_en.html) (accessed 14/04/2018).

<sup>632</sup> The Synod of Bishops, "The Vocation and Mission of the Family in The Church and in the Contemporary World," available at [http://www.vatican.va/roman\\_curia/synod/documents/rc\\_synod\\_doc\\_20151026\\_relazione-finale-xiv-assemblea\\_en.html](http://www.vatican.va/roman_curia/synod/documents/rc_synod_doc_20151026_relazione-finale-xiv-assemblea_en.html) (accessed 14/04/2018).

letter to Pope Francis, the so-called five ‘dubia’ or doubts, and asked him to answer by yes or no to some extracts of AL.

The letter of the four Cardinals: Walter Brandmüller, Raymond L. Burke, Carlo Caffara, and Joachim Meisner is made up of five points and is followed by the explanation of the points made.<sup>633</sup> The four cardinals question some statements in AL 300-305 in relation to continuity with Francis’ predecessors and the teaching of the Church. It is written as follows:

Following the publication of your apostolic exhortation *Amoris Laetitia*, theologians and scholars have proposed interpretations that are not only divergent, but also conflicting, above all in regard to Chapter VIII. Moreover, the media have emphasized this dispute, thereby provoking uncertainty, confusion and disorientation among many of the faithful. Because of this, we the undersigned, but also many bishops and priests, have received numerous requests from the faithful of various social strata on the correct interpretation to give to Chapter VIII of the exhortation. Now, compelled in conscience by our pastoral responsibility and desiring to implement ever more that synodality to which Your Holiness urges us, with profound respect, we permit ourselves to ask you, Holy Father, as supreme teacher of the faith, called by the Risen One to confirm his brothers in the faith, to resolve the uncertainties and bring clarity, benevolently giving a response to the *dubia* that we attach to the present letter.<sup>634</sup>

The four cardinals refer to chapter eight of AL and in particular the extract, which Pope Francis entitles “The Mitigating Factor in Pastoral Discernment.” (AL 301-303) and the first number AL 305 on the “Rules and Discernment” (AL 304-306). The extracts of AL questioned by the four cardinals are all about remarried divorcees. They refer to two previous Apostolic Exhortations of Pope John Paul II, *Familiaris Consortio* 84 (hereafter FC) and Pope Benedict XVI, *Sacramentum Caritatis* 29 (hereafter SC) to question the meaning of ““in certain cases” found in note 351 (no 305)” of AL.<sup>635</sup> We read from FC and SC what follows:

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<sup>633</sup> Edward Pentin, “Full Text and Explanatory Notes of Cardinals Questions on *Amoris Laetitia*,” available at <http://www.ncregister.com/blog/edward-pentin/full-text-and-explanatory-notes-of-cardinals-questions-on-amoris-laetitia> (accessed 16/04/2018).

<sup>634</sup> *Ibid.*

<sup>635</sup> Also see here the article of Martin Lintner who analysis the relationship between FC 84 and AL 8 where he shows that AL chapter VIII goes beyond FC 84 to promote the formation of the consciences. (Martin

However, the Church reaffirms her practice, which is based upon Sacred Scripture, of not admitting to Eucharistic Communion divorced persons who have remarried. They are unable to be admitted thereto from the fact that their state and condition of life objectively contradict that union of love between Christ and the Church which is signified and effected by the Eucharist. Besides this, there is another special pastoral reason: if these people were admitted to the Eucharist, the faithful would be led into error and confusion regarding the Church's teaching about the indissolubility of marriage (FC 84).

The Synod of Bishops confirmed the Church's practice, based on Sacred Scripture (cf. Mk 10:2- 12), of not admitting the divorced and remarried to the sacraments, since their state and their condition of life objectively contradict the loving union of Christ and the Church signified and made present in the Eucharist (SC 29).

These extracts from the documents of the predecessors of Pope Francis not only question the continuity of the teaching of the Church under the papacy of Francis but also raise a question of Pope Francis' moral theology of the family. The next section will study Pope Francis' moral theology on vulnerable families.

#### **5.4.2 Pope Francis' Moral Theology on Vulnerable Families**

There have been numerous theological studies of AL and the theology conveyed by this document. The Pope has been accused of having a “weak theology, which seeks to proceed apparently without direct dogmatic defence of traditional Christian moral understandings regarding sexuality, reproduction, and end-of-life decision making.”<sup>636</sup>

The questions here could be: Do those accusations stand? Is Pope Francis' theology in contradiction with his predecessors and in rupture with the social teaching of the Church?

This research will try to answer these questions in two parts: firstly, one will assess Pope Francis' moral theology in AL and secondly, it will focus on Pope Francis and the question of his continuity with the Social Teaching of Church in AL.

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M. Lintner, “Divorce and Remarriage: A reading of *Amoris Laetitia*” in *A Point of No Return? Amoris Laetitia on Marriage, Divorce and Remarriage* (Berlin: LIT VERLAG Dr. W. Hopf, 2017), 126-135.

<sup>636</sup> Mark J. Cherry, “Pope Francis, Weak Theology, and the Subtle Transformation of Roman Catholic Bioethics” in *Christian Bioethics*, 21 (1), 84.

#### **5.4.2.1 Pope Francis' Moral Theology of Vulnerable Families in AL**

This section will be divided into two parts: the first part will analyse the influence of the theology as discernment of the authentic life inspired by the *Spiritual Exercises* in AL. The second part will focus on the critical assessment of the personalistic moral theology underlying chapter eight of AL.

##### *5.4.2.1.1. Theology as Discernment of the Authentic Life in AL*

Many theologians such as Juan Carlos Scannone, and Philippe Bordeyne agree that AL cannot be understood outside the Ignatian tradition.<sup>637</sup> For Scannone it is necessary to consider the influence of spiritual discernment. This spiritual discernment is considered by the German theologian, Christoph Theobald, as an Ignatian way of doing theology or “la théologie comme discernement de la vie authentique.”<sup>638</sup> In AL, Pope Francis underlines pastoral discernment in relation to the situation of divorced and remarried couples. He recommends not only gradualness in the pastoral care of divorcees and remarried couples but also the discernment of the pastors. It is read:

For the Church's pastors are not only responsible for promoting Christian marriage, but also the “pastoral discernment of the situations of a great many who no longer live this reality. Entering into pastoral dialogue with these persons is needed to distinguish elements in their lives that can lead to a greater openness to the Gospel of marriage in its fullness”. In this pastoral discernment, there is a need “to identify elements that can foster evangelization and human and spiritual growth (AL 293.)

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<sup>637</sup> Juan Carlos Scannone, “Du Bien au Meilleur : Un Discernement Spirituel Enraciné dans la Tradition de Saint Ignace” in *Divorces Remariés : Ce qui change avec François* (Ed. Philippe Bordeyne; Paris: Salvator, 2017), 115.

<sup>638</sup> Theobald, *Le Christianisme comme Style*, 413. Also see the critical contemporary reading of Ignatian discernment by Christina A. Astorga where she points out two limitations to Ignatian discernment. Firstly, we can only discern within the limits of our freedom: “we can only discern God's desire for us in conjunction with our own desire for our life. We cannot discern what other people would desire for themselves in relation to what we desire. (...) Relational as freedom is, the fruit of our discernment is limited.” Secondly, “another limit of discernment is the nature of its certitude. We cannot speak of a scientific certitude, given the phenomenon of chance on both the micro and macro levels.” (Christiana A. Astorga, *Catholic Moral Theology and Social Ethics: A New Method* (Maryknoll, NY: Orbis, 2014), 485. Robert Blair Kaiser, *Inside The Jesuits: How Pope Francis is Changing the Church and the World* (London: Rowman & Littlefield, 2014).

Pope Francis also calls not only for mercy but discernment for “the divorced who have entered a new union, [and who] can find themselves in a variety of situations, which should not be pigeonholed or fit into overly rigid classifications leaving no room for a suitable personal and pastoral discernment.” (AL 298).<sup>639</sup> AL from number 296 to 300 describes the discernment of ‘irregular situations.’ Francis also points out the mitigating factors in pastoral discernment and gives some rules for discernment (AL 301-306). For the Holy Father, it should always be remembered that pastoral discernment can never be separated from the Gospel demands of truth and charity, as proposed by the Church (AL 300).

In a show “Jeudis Théologie” on the French catholic TV channel KTO broadcast on 13 October 2016 the Auxiliary Bishop of Paris, Jerome Beau also read AL as a call for discernment. For him, discernment is a call to live the experience of joy in Love according to ‘Jesus’s loving gaze in the Gospels’. He calls on the readers of AL to always consider Jesus’ loving gaze as it expresses his mercy. Why does he choose ‘Jesus’s loving gaze upon’ each one of us? It is because the gaze of Jesus never excludes. For him, Jesus looks at the poor through the lens of mercy. The second reason that he suggests in reading AL as a call to discernment is following the path of growth. It implies not imposing a set of norms on broken families even if they are necessary, but to accompany broken families with mercy and love. It is the responsibility of the pastors to engage in a way of mercy through pastoral and responsible discernment. Marriage then becomes a dynamic process of integration, history of salvation, and God’s instrument of growth. In the face of painful situations, the Pope calls us to responsible discernment because we must learn to discern. Discernment makes it possible to integrate this into a dynamic process where all elements

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<sup>639</sup> Thomas Knieps-Port le Roi and Roger Burggraeve also comment on this number in a section dedicated to the relationship between discernment and conscience. (See Id., “Forum: New Wine in New Wineskins: *Amoris Laetitia* and the Church’s Teaching on Marriage and Family,” in *Louvain Studies*, 39(2015-16), 297-300.)

of our society must be considered. The merciful gaze of Jesus engages the other in a path that requires transformation, a subjective path. Finally, discernment is a dynamic path of life to meet the joy of love.<sup>640</sup>

Brian Grogan<sup>641</sup> also invites the readers of Pope Francis to bear in mind that the Holy Father's theological thought is rooted in Ignatian Spirituality. He states: "Francis is a Jesuit, and the Jesuits were founded through a communal discernment, of which the details are fully available."<sup>642</sup> This point is interesting as it helps us to understand Francis because

he wants the People of God to engage together in the task of making the Good News known to the world (...) Since new issues will come up for decision as history unfolds, the pope's proposal is that these decisions should be reached by way of communal discernment. The word 'discernment occurs

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<sup>640</sup> Jérôme Beau, "L'Exhortation du Pape François : un appel à discerner" : [http:// www.ktotv.com/video/00112277/l-exhortation-du-pape-francois-un-appel-a-discerner](http://www.ktotv.com/video/00112277/l-exhortation-du-pape-francois-un-appel-a-discerner) (Accessed 27/11/2017).

<sup>641</sup> A Jesuit and the "former President of Milltown Institute of Theology and Philosophy in Dublin. He specialises in Ignatian spirituality." (See the cover of his book, *Making Good Decisions: A Beginner's Guide* (Dublin: Veritas, 2015).)

<sup>642</sup> Brian Grogan, *Making Good Decisions: A Beginner's Guide* (Dublin: Veritas, 2015), 249. The word 'discernment comes from the Latin term 'cerno' which means 'to see', "dis-cerno means 'to judge the difference between things.' Sometimes it simply means wisdom, at other times it means the capacity to choose between right and wrong." (Ibid., 35). For Grogan, the term occurs thirty-three times in the scriptures and for him, the whole Bible can be read as a history of decision-making. (Ibid.) He also notes a common ground between discernment and conscience. In fact, "if conscience helps us to distinguish right from wrong, discernment can be understood as bringing us to the level of distinguishing between good and better. Saint Paul advises his early converts 'to discern... what is good and acceptable and perfect' (Romans 12:2)." (Ibid., 36). Then, to choose between two good options is a proper method of Christian discernment even though sometimes it is not easy to judge the difference between what is good and bad. In addition to the word discernment, the word Christian implies to live like Jesus. Here the Gospels and the Christian tradition are necessary to identify what is best to do. In the process of Christian discernment there is also the assistance of the Holy Spirit. (Ibid.) To further one's understanding of the relationship between Catholic doctrine on authority and the absolute inviolability of personal conscience, there is an article by Todd A. Salzman and Michael G. Lawler, "Amoris Laetitia and Catholic Morals" in *The Furrow*, Vol. 67, 1 (January 2016), 666-75. The article points out the respect of discerning conscience in relationship to 'irregular situations' in *Amoris Laetitia*. Another interesting article is from the Jesuit James F. Keenan, "Redeeming Conscience" in *Theological Studies*, Vol. 76, 1 (2015), 129-147 where he remarks that even though the final report of the extraordinary synod of 2014 made no mention of Conscience, "Conscience is what makes for the credibility of sensus fidelium" and "Sensus fidelium is about the laity's beliefs as a faith lived in conscience." (Ibid., 1231). The previous article should be read in relation to another one where Keenan describes *Amoris Laetitia* as "seeds being planted that would direct the church's attention more specially to the moral agency of the People of God. (James F. Keenan, "Receiving Amoris Laetitia" in *Theological Studies*, Vol. 78, 1 (2017), 193.) Two voices from the Pontifical University of Comillas in Madrid state that the role of fundamental moral theology is to help Christians to discern in their daily life. Inspired by Ignatian spirituality, the two theologians demonstrate that Fundamental Moral Theology is not only a set of norms but above all, is a tool which helps people to discern in a concrete manner. Fundamental moral Theology is interconnected with spirituality and pastoral practices. (Julio Luis Martínez & José Manuel Caamaño, eds., *Moral fundamental: Bases teológicas del discernimiento ético*, (España: Sal Terrae, 2014).

more than twenty times in his Apostolic Exhortation, *The Joy of the Gospel*.<sup>643</sup>

But what is communal discernment? And how does it appear in Pope Francis' decision making in relationship to the sense of faith? Francis' Jesuit roots will be studied in the next chapter of this thesis when comparing him with his fellow Jesuit Jon Sobrino. Grogan remarks that if the theme of discernment is so recurrent in Pope Francis' art of making good decisions, this is not surprising because he is the first Jesuit Pope.<sup>644</sup> Discernment is part of the Jesuit mindset and Pope Francis wants it to become universal for the Church. Speaking about Pope Francis and discernment, Grogan asserts:

Never before has the theme of discernment been so highlighted by a papacy. (...) For Francis, Christian discernment is the only way forward for the Church. Discernment puts the divine agenda before any human agenda. We are to be led by God in all that we do, and we are to discern together as a single people of God. This gives us a new understanding of who we are – not passive recipients of Church teaching, but creators of it!<sup>645</sup>

This passage illustrates what communal discernment is all about. The church is understood not only as the Magisterium but also as the people of God taking part in decision making. It implies openness to the Holy Spirit. Under Pope Francis, this art of discernment “marks a seismic shift in the government of the Church.”<sup>646</sup> Grogan identifies in EG some passages referring explicitly to discernment in the art of decision making in the Church under Pope Francis' papacy. He also uses the expression ‘collegial style’ to describe the communal discernment under Francis. He describes it in the following passage:

We can explore its parameters (of the communal discernment) by listening to what he says about it in the *Joy of the Gospel*: The totality of the faithful have an instinct of faith – *sensus fidei* – which helps them to discern what is truly of God (EG 119). Every Christian and every community must discern the path that the Lord points out (EG 20). Local issues of discipline are to be discerned by the relevant bishops, rather than by Rome (EG 16). Wise and realistic communal pastoral discernment should be undertaken, especially under the leadership of the bishop (EG 33). Each Church is to undertake a

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<sup>643</sup> Ibid., 189.

<sup>644</sup> Ibid.

<sup>645</sup> Ibid.

<sup>646</sup> Ibid., 190.



resolute process of discernment to make the missionary impulse ever more focused, genuine and faithful (EG 30). In discernment we find the path of the Spirit and understanding of the Gospel (EG 45). We can choose between a clinical and neutral process of evangelising, or an evangelical discernment, nourished by the Holy Spirit (EG 50). Discernment will entail allowing one self to be guided by the Holy Spirit, renouncing the attempt to plan and control everything to the last detail, and instead letting him [the Spirit] enlighten, guide and direct us, leading us wherever he wills (EG 288).<sup>647</sup>

Grogan remarks that since Francis came into office he has been trying to instil an atmosphere of communal discernment within the Church in various ways such as: collegiality, dialogue, global communication, inclusion of the poor, and the listening Church.<sup>648</sup> Communal discernment implies humble searching where no room is left for pride or dogmatism, to create a genuine community where respect and love grow as the search continues, an environment where everyone has the opportunity to speak freely. Finally, “Instead of a Government/Opposition approach, all the members explore together the arguments in favour of the option under consideration, then the arguments against it.”<sup>649</sup> In fact,

Francis combines his understanding of conscience with the Ignatian concept of discernment when he writes that: “to follow one’s conscience means to discern the situation, to listen to what God says in the Gospel and in the Church, and to converse with pastor or lay person (AL 312).<sup>650</sup>

As Michael G. Lawler and Todd A. Salzman remark, this discernment is a complex process, which needs time, patience, and a commitment to a charitable dialogue.<sup>651</sup> Beyond this complexity, it is also the expression of a theological school. It is what the Jesuit theologian Christoph Theobald summarizes by the statement “relier la conception même de la théologie au patrimoine de telle ou telle famille spirituelle.” And in Pope Francis’ case it is a way of doing theology using “la richesse inestimable de la

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<sup>647</sup> Ibid., 191.

<sup>648</sup> Ibid., 192-193.

<sup>649</sup> Ibid., 250-251.

<sup>650</sup> Thomas Knieps-Port le Roi and Roger Burggraeve, Forum, 299. Also see Timothy Radcliffe, “How can we “Make Room for the Consciences of the Faithful” in *A Point of No Return? Amoris Laetitia on Marriage, Divorce and Remarriage* (Berlin: LIT VERLAG Dr. W. Hopf, 2017), 65-73.

<sup>651</sup> Michael G. Lawler and Todd A. Salzman, “Pope Francis and his Predecessors” in *The Furrow*, Vol. 68, 11 (November 2017), 588.

tradition ignatienne.”<sup>652</sup> A few years ago, he demonstrated that not only the rich spiritual tradition of the Religious Orders and Congregations should be considered as a way of doing theology today, but also that Ignatian discernment based on the *Spiritual Exercises* is a theological method.

When Theobald’s book was published in 2007 few could have guessed that a few years later a Jesuit would become Pope. Theobald highlights how the Church abounds in a multitude of currents and spiritual schools. Some of these currents have generated and still generate specific ways of practicing theology and answering the question of its internal unity.<sup>653</sup> For him, it is important and even useful to remember this enormous wealth and to highlight the many ways of linking the very conception of theology to the heritage of a specific spiritual tradition.<sup>654</sup>

So, the insight here is that Francis’ *modus procedendi* cannot be understood outside the context of the Ignatian spiritual tradition. Pope Francis is influenced by the theology of the “Spiritual Exercises” of Saint Ignatius. In the same line as his Jesuit predecessors (Erich Przywara, Gaston Fessard, Karl Rahner, and Hans Urs von Balthasar). Theobald suggests that the “Spiritual Exercises” convey “une manière propre de faire (*modus procedendi*) de la théologie” or a way of doing theology. As a Jesuit Theobald considers that when someone questions the theology of the Society of Jesus, one is not first referred to a body of doctrine but to a *modus procedendi*, which emerges in a theology understood as discernment of authentic life.<sup>655</sup> Pope Francis’ style is inspired by the Ignatian *modus procedendi* of the Spiritual Exercises defined by another outstanding Jesuit, Michel de Certeau, as “une manière de procéder.”<sup>656</sup>

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<sup>652</sup> Theobald, *Le Christianisme comme Style*, 413.

<sup>653</sup> *Ibid.*

<sup>654</sup> *Ibid.*, 414.

<sup>655</sup> *Ibid.*

<sup>656</sup> Michel De Certeau, “L’espace du désir ou Le « fondement » des Exercices Spirituels,” in *Christus*, t. 20, no 77, 1973, 119.

Theology as a discernment of the authentic life implies that the theologian, while doing theology, must look at himself and question his own identity. Discernment unifies the reflection of the theologians in their daily life. This discernment recalls the usefulness of highlighting the spiritual heritage of religious congregations and religious orders in theology today.<sup>657</sup> For Scannone, Pope Francis leads the Catholic Church today using Ignatian discernment: “A mon avis, François gouverne l’Eglise en prenant pour guide, en grande partie le discernement”<sup>658</sup>

For Theobald, theology as discernment implies that we no longer separate the so-called “scientific” theology from spiritual experience and its manifestation in spiritual literature. Thus, when one wonders about the theology of the Society of Jesus, one does not find oneself first referred to a body of doctrine or to a very definite intellectual structure but to authentic daily life as a criterion and purpose of discernment.<sup>659</sup> This is not surprising because Pope Francis also applies this to bioethical and moral issues:

We have long thought that simply by stressing doctrinal, bioethical and moral issues, without encouraging openness to grace, we were providing sufficient support to families, strengthening the marriage bond and giving meaning to marital life. We find it difficult to present marriage more as a dynamic path to personal development and fulfilment than as a lifelong burden (AL 37). Our teaching on marriage and the family cannot fail to be inspired and transformed by this message of love and tenderness; otherwise, it becomes nothing more than the defence of a dry and lifeless doctrine (AL 59).

Although this is not to everyone's taste, Pope Francis applies the theology of discernment in Chapter Eight of AL. Scannone recognizes that this is not the central chapter of the exhortation, but it is the one that challenges the most because it is “a path of discernment that is born of mercy in the face of human vulnerability and continues to recognize, with the Second Vatican Council, the value of personal conscience.”<sup>660</sup>

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<sup>657</sup> Ibid.

<sup>658</sup> Scannone, “Du Bien au Meilleur,” 116.

<sup>659</sup> Ibid., 415.

<sup>660</sup> Scannone, “Du Bien au Meilleur,” 123. Also see GS 16.

Francis' moral theology of vulnerable families implies at least three things: firstly, the understanding of moral conscience as the ultimate criterion of morality. Secondly, an application of the doctrine to particular situations. Thirdly, the necessity of ecclesial and pastoral discernment.<sup>661</sup> The previous section analysed AL in relationship to the theology of the *Spiritual Exercises*. The next section will assess critically the personalistic approach underlying AL.

#### 5.4.2.1.2 AL and the Personalistic Approach

For Thomas Knieps-Port le Roi and Roger Burggraeve the change of tone in AL “reveals a much more radical shift in the pope’s theological approach to marriage and family.”<sup>662</sup> This shift in the theological approach appeared not in chapter eight as some readers might have expected but rather in chapter four, “Love in Marriage” where Pope Francis defines conjugal love as “the greatest form of friendship. (...) a union possessing all the traits of a good friendship: concern for the good of the other, reciprocity, intimacy, warmth, stability and the resemblance born of a shared life (AL 123).”<sup>663</sup> Thomas Knieps-Port le Roi and Roger Burggraeve remark that Francis refers to Thomas Aquinas and his characterization of marriage as friendship to define conjugal love.

For them this “indicates the consequent and uncompromising option for a personalist approach to marriage and the turning away from a natural law-based argument, which would define marriage principally in terms of the ends of an institution or of the purposes of sexuality.”<sup>664</sup> By referring to conjugal love in the Thomistic term of friendship, AL does not distinguish marital love from other forms of relationship. This means that “marital love is inscribed into a trajectory of development and growth that

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<sup>661</sup> Ibid., 124-28.

<sup>662</sup> Thomas Knieps-Port le Roi and Roger Burggraeve, “New Wine in New Wineskins: Amoris Laetitia and the Church’s Teaching on Marriage and Family,” in *Louvain Studies*, 39 (2015-16): 284-302, 286.

<sup>663</sup> Ibid., 289.

<sup>664</sup> Ibid., 290.

runs through different stages.”<sup>665</sup> Pope Francis’ approach gives priority to the couple’s growth in the marriage and goes beyond the limitations and fragilities of the human person in a relationship.<sup>666</sup> In this perspective AL adopts and even recommends a “healthy realism (AL 153)”. Andrew Meszaros finds this discouraging for the reader “to find that much of the language of “reality” and that which is “real” is dedicated to the mundane hardships of everyday life.”<sup>667</sup> But is this remark indicative of the readers of AL in general? Because it could also be said that the readers of AL who are aware of the influence of the theology of Incarnation on Pope Francis and also his influence from Romano Guardini’s theology could easily cope with Pope Francis’ language of realism. For Christoph Cardinal Schönborn “le pape François veut, en parlant « des familles réelles » (« così come sono », dit l’italien) (AL no 36), « garder les pieds sur terre » (AL no 6).”<sup>668</sup>

Thomas Knieps-Port le Roi and Roger Burggraeve also conclude that AL and particularly chapter eight seems to demonstrate some understanding of so-called ‘irregular situations’, and this could be perceived by a great number of the contemporary faithful as

expression of a condescending and paternalistic attitude and the dispensation of some “cheap mercy.” Such a stance would suggest that the church is not able or willing to realize that what it regards as deviant moral behaviour is perceived by many Christians themselves as morally acceptable or even desirable and is thus in fact the result of deviant lived convictions or a heterodox morality. (...) Yet, the exhortation itself goes beyond an act-centred approach to morality and the strategy of deculpabilization when it comes to another central element in Francis’s approach, the logic of pastoral discernment and mercy.<sup>669</sup>

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<sup>665</sup> Ibid., 292.

<sup>666</sup> Ibid., 293

<sup>667</sup> Andrew Meszaros, “The Gospel of the Family: Reflections on a Theme” in *The Furrow*, Vol. 69, 2 (February 2018), 57-75, 69.

<sup>668</sup> Christoph Schönborn, “Préface,” in *Une Morale Souple mais non sans Boussole. Répondre aux doutes des quatre cardinaux à propos d’Amoris Laetitia*, Paris : Cerf, 2017, 10.

<sup>669</sup> Thomas Knieps-Port le Roi and Roger Burggraeve, 297.

Thomas Knieps-Port le Roi and Roger Burggraeve's remarks about the perception of AL's theology as 'cheap mercy' highlight the controversial reception of AL. Reflecting on the Transformation of the Roman Catholic Bioethics under Francis, Mark J. Cherry concludes that Pope Francis' moral theology can be qualified as "weak theology" in the sense that Francis does not confront secular bioethics directly.<sup>670</sup> He asserts:

Central to weak theology is the deflation of moral-theological claims. Moral statements may still be made, but they are stated without any emphasis on dogmatic certainty and with an ecumenical openness to the bioethical positions and moral perspectives of others. For example, with weak theology one does not say all should recognize that "abortion is the murder of a child in the womb," but rather "abortion is wrong choice for me"<sup>671</sup>

For example, on this last remark, Mark J. Cherry accuses Pope Francis of not condemning abortion in clear terms in EG

It is not "progressive" to try to resolve problems by eliminating a human life. On the other hand, it is also true that we have done little to adequately accompany women in very difficult situations, where abortion appears as a quick solution to their profound anguish, especially when the life developing within them is the result of rape or a situation of extreme poverty (EG 214).

But was this accusation and condemnation by Mark J. Cherry of Francis fair? In AL Pope Francis will reaffirm in clear terms the teaching of the Church on abortion and other situations: "the Church strongly rejects the forced State intervention in favour of contraception, sterilization and even abortion." (AL 42). Pope Francis also condemns abortions in GE in very strong terms: "Our defence of the innocent unborn, for example, needs to be clear, firm and passionate, for at stake is the dignity of a human life, which is always sacred and demands love for each person, regardless of his or her stage of development" (GE 101)<sup>672</sup> In fact, Cherry wrote his article in 2015 before AL was issued.

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<sup>670</sup> Mark J. Cherry, Pope Francis, 85.

<sup>671</sup> Ibid.

<sup>672</sup> Here, Pope Francis compares the lives of the poor with those of unborn children in the following terms: "Equally sacred, however, are the lives of the poor, those already born, the destitute, the abandoned and the underprivileged, the vulnerable infirm and elderly exposed to covert euthanasia, the victims of human trafficking, new forms of slavery, and every form of rejection.[84] We cannot uphold an ideal of holiness that would ignore injustice in a world where some revel, spend with abandon and live only for the latest consumer goods, even as others look on from afar, living their entire lives in abject poverty." (GE 101).

#### 5.4.2.2 Pope Francis and the continuity of the Social Teaching of the Church in AL

For Gerald O’Collins, the Final Report of the Synod of Bishop on October 26, 2015 and AL are inspired by the documents of Vatican II and the post-synodal, apostolic exhortation of John Paul II on the Role of the family in the Modern World, *Familiaris Consortio* issued on November 22, 1981.<sup>673</sup> He states: “Like *The Final Report*, *Amoris Laetitia* draws from the documents of Vatican II and *Familiaris Consortio*. It also quotes frequently and at length the text of the Final Report and, very occasionally, simply refers to the Final Report without quoting its words.”<sup>674</sup>

This research has shown in the previous section how Pope Francis quotes his predecessors in EG when speaking about economic matters especially PP of Pope Paul VI. According to Michael G. Lawler and Todd A. Salzman, AL also demonstrates the continuity with PP and earlier conciliar and papal pronouncements on Catholic social teaching and builds on those developments.<sup>675</sup> For example the teaching on the authority and the inviolability of personal conscience in AL follows a long-established Catholic

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There are strong reactions from anti-abortion activists such as Marjorie Dannenfelser, president of the anti-abortion Susan B. Anthony List, to LifeSiteNews, who objects that Pope Francis should not place the lives of the unborn children at the same level as any social justice issue. (Christina Cuterucci, “Pro-Lifers Dismiss Pope’s Declaration that Protecting Migrants Is Just as Important as Abortion,” available at <https://slate.com/news-and-politics/2018/04/pro-lifers-dont-seem-to-care-that-the-pope-said-immigrant-justice-is-just-as-important-as-abortion.html> (accessed 22/04/2018). Nevertheless, there is a different opinion from another ‘pro-lifer’, Bishop Conley from the diocese of Lincoln in the United States who interprets Pope Francis’ previous quotation in the sense that, every life matters: “Pope Francis points out that a Christian cannot consider the dignity of migrants and others on the periphery to be less than the dignity of the unborn. He is right. Every single soul stands equally dignified in the eyes of God. The pope has also affirmed, though, that a society which tolerates abortion will never achieve real and lasting justice. And his words do not conflict with the truth: that when the unborn are in danger of being aborted, it is virtuous to invest our energies in saving their lives, even while remaining in sincere solidarity with those who are suffering other serious injustices.” (Bishop Conley, “*Gaudete et exsultate* — a pro-life call,” available at <http://www.lincolndiocese.org/op-ed/bishop-s-column/10919-gaudete-et-exsultate-a-pro-life-call> (accessed 22/04/2018).) One might also understand the new revision of number 2267 of the Catechism of the Catholic Church on death penalty granted by Pope Francis to the Secretary of the CDF in the sense that every human life matters. Concerning the presentation of GE, one can consult the article of Ronald D. Witherup, “Pope Francis on the Universal Call to Holiness,” in *The Pastoral Review*, Volume 14, Issue 4, July/August 2018, 4-9.

<sup>673</sup> Gerald O’Collins, “The Joy of Love (*Amoris Laetitia*): The Papal Exhortation in Its Context” in *Theological Studies*, 2016, Vol. 77(4), 905-6.

<sup>674</sup> *Ibid.*, 906.

<sup>675</sup> Michael G. Lawler and Todd A. Salzman, “Pope Francis and His Predecessors – A Remarkable and Unremarked Continuity” in *The Furrow*, November 2017, 584.

tradition.<sup>676</sup> But the teaching on conscience is accompanied by discernment in ethical decision-making. For Lawler and Salzman Francis' concept of discernment is "a distinct anthropological contribution to Catholic ethics, both social and sexual."<sup>677</sup> In addition, they note

The shift from a focus on rules and norms, which has been the predominant focus of Catholic sexual ethics, to a focus on virtue, is a fundamental shift in *Amoris Laetitia*. Virtue focuses on the character of a person rather than on her acts, on being rather than doing. Acts are important, of course, since they both reflect and shape virtuous character; virtue produces and manifests itself in virtuous acts. In virtue ethics, however, ethical agents and their characters come first, and their ethical actions come second, action follows being.<sup>678</sup>

Reflecting on AL and the Church's Teaching on Marriage and Family, Thomas Knieps-Port le Roi and Roger Burggraeve observe that there is a new tone in Francis' teaching in AL. For them, "the document (...) does not condemn or prohibit any moral or pastoral practice, nor does it offer overly abstract or highly idealistic reflections. Rather, AL connects with the lived reality of contemporary family life and shows a real concern for persons whose relationships are marked by fragility, failures and faults."<sup>679</sup> For them, the shift is not simply the result of not insisting on the previous moral discourse but is also a pastorally orientated approach, "which leaves the underlying teaching unchanged."<sup>680</sup>

Two Italian scholars, Giulia P. Di Nicola and Attilio Danese, who are also a couple reflect on what they call the 'discontinuous continuity' of AL. They observe that at the outset of the document Pope Francis is well balanced between two poles:

The debates carried on in the media, in certain publications and even among the Church's ministers, range from an immoderate desire for total change without sufficient reflection or grounding, to an attitude that would solve

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<sup>676</sup> Ibid. Also see Michael G. Lawler and Todd A. Salzman, "Amoris Laetitia and Catholic Morals," in *The Furrow*, January 2016, Vol. 67 (1), 666-75. There is found here a consistent and relevant synthesis about the authority and the inviolability of conscience from Saint Thomas Aquinas to Vatican II.

<sup>677</sup> Ibid., 585.

<sup>678</sup> Ibid., 586.

<sup>679</sup> Thomas Knieps-Port le Roi and Roger Burggraeve, "New Wine in New Wineskins: Amoris Laetitia and the Church's Teaching on Marriage and Family," 284.

<sup>680</sup> Ibid., 286.



everything by applying general rules or deriving undue conclusions from particular theological considerations (AL 2).<sup>681</sup>

For them, Pope Francis does not say or do anything disproportionately new except to stretch out his hand to his brothers and sisters who like him are sinners and to propose the mercy of God. Reading AL with the lens of mercy, Di Nicola and Danese conclude that

“noble compromises” that sought to achieve the greatest possible convergence between the defenders of the traditional doctrine and the supporters of change, Pope Francis urges attention to each case on its own, in a dialogue that goes into the depths and leads people to examine their own consciences with regard to the conditions of their own lives and, as a result of this to find the answer to the question whether or not to receive the sacrament of the eucharist.<sup>682</sup>

Talking about the reception around the world of AL, James. F. Keenan underlines the warm welcome to the document in South Africa not only as a sign of continuity with the teaching and the tradition of the Church but also as a sign of tender mercy from Pope Francis to vulnerable people:

Archbishop William Slattery of Pretoria, South Africa, spokesperson of the Catholic Bishops’ Conference in South Africa, said, “While the exhortation flows directly from the synod and traditional church teaching, the pope – as usual – moves far from the hard realities of cold legislation to embrace with tenderness the lived’ experience of this the most human of all institutions.”<sup>683</sup>

To those who continue to accuse Pope Francis of spreading heresy through AL 305 (communion for some divorced and civilly remarried couples), the German Cardinal Walter Kasper recalls that AL should prompt discussion. Besides, AL is in continuity with the teaching of the previous popes. For Kasper, “A heresy is a tenacious disagreement with formal dogma. The doctrine of the indissolubility of marriage has not been called into question on Pope Francis’ part.”<sup>684</sup> *The Irish Catholic* newspaper reports the words of the cardinal in these terms:

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<sup>681</sup> Giulia P. Di Nicola and Attilio Danese, “Notes on Amoris Laetitia,” in *INTAMS review*, 22 (2016), 3.

<sup>682</sup> *Ibid.*, 5.

<sup>683</sup> James. F. Keenan, “Receiving Amoris Laetitia” in *Theological Studies*, 2017, Vol. 78 (1), 193-212, 207.

<sup>684</sup> *The Irish Catholic*, March 8, 2018, 27.

Pope Francis is in complete continuity with the direction opened by preceding Popes. I do not see any reason, then, to say that this is a heresy.” Catholic tradition, he insisted, “is not a stagnant lake, but is like a spring, or a river: it is something alive. The Church is a living organism and thus it always needs to validly translate the Catholic tradition into present situations.”<sup>685</sup>

Reflecting on the relationship between AL and Catholic Morals, Todd A. Salzman and Michael G. Lawler come to the same conclusion as cardinal Kasper. For the readers who wonder whether there is a *Status Quo* or a development of the Social Teaching in AL, Salzman and Lawler answer:

There is no change of Catholic moral doctrine but there is certainly organic development in the interpretation and application of that doctrine. There is no change in Catholic doctrine as it has existed since long before AL, for the absolute authority and inviolability of personal and informed conscience and the modifying impact of circumstances on ethical judgement have long been part of Catholic moral doctrine. (...) Pope Francis has brought the long-established Catholic doctrines about the authority and inviolability of an informed conscience and about the modifying effect of circumstances on ethical judgments out of the shadows, where they have languished for several centuries, and has placed them squarely in the forefront of Catholic moral interpretation and practice.<sup>686</sup>

## 5.5 CONCLUSION

This chapter set out to critically assess Pope Francis’ social and theological thought. This has been worked out in two main sections. First, it has shown that the accusations made against Pope Francis whereby he is purported to be a Marxist or communist do not stand. This is because Pope Francis’ social teaching is in continuity with a long tradition of social doctrine of the Church. The Social Teaching of the Church has never made a concession to Marxism or to savage capitalism. To illustrate this continuity, I also

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<sup>685</sup> Ibid. Also see Luc Thomas Somme, “*Le Mariage et L’Exigence de la Morale Souple*,” in *Bulletin de Littérature Ecclésiastique*, No 474, Avril-Juin, 2018, 7-20.

<sup>686</sup> Todd A. Salzman and Michael G. Lawler, “*Amoris Laetitia* and Catholic Morals” in *The Furrow*, December 2016, 675. For Conor M. Kelly, the moral theologians should learn from AL at least three things: Firstly, the moral theologians should “create the culture of moral discernment in the Church and give special attention to the process of moral deliberation”. Secondly, if morality should be understood in terms of ideals and growth, moral theologians need to “define the role and the meaning of the ideal in the Christian moral life”. Thirdly, “moral theologians should also embrace their revived role by attending to ethical questions that arise in people’s ordinary lives. (Conor M. Kelly, “The Role of the Moral Theologian in the Church,” in *Theological Studies*, 77(4), 922-948.

analysed his relationship to some of his predecessors such as Pope Paul VI, with the encyclical PP as well as to Pope John Paul II and Benedict XVI.

The second section of this chapter studied the moral theology underlying Pope Francis' pastoral approach to vulnerable families. This study discovered a double approach in the ethical thinking of the Pope: firstly, it explores the pastoral approach of Pope Francis in AL in general. Its chapter eight in particular cannot be understood without grasping theology as discernment of authentic life. Pope Francis' lifestyle, papacy and theological thinking are deeply influenced by the theology of the *Spiritual Exercises*, which conveys an Ignatian *modus procedendi* of doing theology. Secondly, AL should not be understood outside the personalistic approach of conjugal love that emphasizes the mutual growth of couples and the law of gradualness, all perceived through the lens of mercy. As Martin Lintner asserts:

As Pope Francis stresses, mercy means to choose the *via caritatis*, which means not to judge nor condemn the other, but to “remain ever open to new stages of growth and to new decisions which can enable the ideal to be more fully realized (AL 303) and “to find possible ways of responding to God and growing in the midst of limits.”<sup>687</sup>

To accomplish the project of mutual growth and the law of gradualness, all understood within the framework of mercy, Pope Francis also re-emphasizes the importance of the inviolability of subjective consciences. He recalls that the Church must notably form consciences and not replace them. The originality of AL is that

not every situation of remarriage after divorce automatically presents a grave sin for the involved moral subjects. This previous position that “objective truth, according to magisterial teaching, is that the couples living in this situation are committing adultery and cannot receive Communion and that their subjective consciences must adhere to this truth,” is not sustainable any more. *Amoris Laetitia* affirms that concerned people, who live in such situations, may “be living in God’s grace, can love and can also grow in the life of grace and charity, while receiving the Church’s help to this end, and [what] in certain cases... can include the help of the sacraments” (AL 305 plus note 351).<sup>688</sup>

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<sup>687</sup> Lintner, “Divorce and Remarriage,” 138.

<sup>688</sup> *Ibid.*, 140.

It is also a signal to moral theologians who now have the task of forming consciences from the concrete situations of Christian life. The importance of this chapter was also to set the scene for the next and final chapter of this thesis, a comparative analysis of Jon Sobrino and Pope Francis concerning the language they use to speak about the poor/vulnerable.

## CHAPTER SIX

### SOBRINO AND POPE FRANCIS' LANGUAGE ABOUT THE POOR/VULNERABLE: JOURNEY FROM THE “PREFERENTIAL OPTION FOR THE POOR” TO “COMPASSION FOR THE VULNERABLE”?

#### 6.1 INTRODUCTION

As G. Lafont has rightly noted “the question of language plainly lies at the heart of (...) theology, since the word “theology” itself includes the logos.”<sup>689</sup> Studying Jon Sobrino’s and Pope Francis’ language about the poor/vulnerable involves examining “human experience translated into theoretical construction.”<sup>690</sup> In addition, as soon as this theoretical construction has taken place, a double problem emerges: the first concerns the nature of meaning, namely, the meaning of words and sentences; and the second problem is related to the meaning of the propositions.<sup>691</sup>

In this chapter, studying the language used by Sobrino and Francis to describe the poor/vulnerable, means finding the meaning of the sentences, texts or expressions used by our authors to speak about the poor/vulnerable, which is also the expression of their thought. Our reflections here are guided by two questions: what is Sobrino's and Francis' language about the poor/vulnerable? What are the implications of the meaning of their language about the poor/vulnerable in the Church today? To answer these questions and achieve this objective, this chapter proceeds in four sections. The first explores Sobrino’s language of the poor inherited from Liberation theology. The second section examines Francis’ language of the poor/vulnerable specifically in *Evangelii Gaudium*, *Laudato Si’* and *Amoris Laetitia*. The third section highlights the differences and the similarities in the language used to describe the poor/vulnerable. The aim of this section is to show how

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<sup>689</sup> G. Lafont, “Language” in *Dictionary of Fundamental Theology*, 597. Joerg Rieger remarks that the turn to the language and the text is proper to the postmodern theologies with the outstanding figures such as: George Lindbeck and Hans Frei, colleagues at Yale Divinity School. (Joerg Rieger, *God and the Excluded: Visions and Blind Spots in Contemporary Theology* (Minneapolis: Fortress, 2001), 71.

<sup>690</sup> Sylvain Auroux, *La Philosophie du Langage* (Paris : PUF, 2008), 3.

<sup>691</sup> *Ibid.*, 4.

it is complex and difficult today to define some concepts such as: option, preferential, and the poor and how new forms of human suffering challenge the understanding of the concept 'poor' in the free market society. The words poor or vulnerable will be used interchangeably in this chapter. However, this study also demonstrates in the third section that the second concept 'vulnerable' is more inclusive considering the new forms of human suffering in today's free market, considered by Pope Francis.

## **6.2 SOBRINO AND THE LANGUAGE OF LIBERATION THEOLOGY**

The language used by Jon Sobrino to describe the poor is part of his overall theological vision. This language is also rooted in his experience as a Jesuit and liberation theologian in El Salvador. In his book, *The Principle of Mercy*, Sobrino wrote his autobiography in which he speaks of the awakening from the sleep of inhumanity. Born in the Western world and trained in the Western world, Sobrino experienced material poverty when he arrived in El Salvador in 1957. It was not until 1974 that he became aware of the situation of poverty when he began teaching philosophy. Helped by his encounter with authors like Karl Rahner and inspired by the spirit of Vatican II, Sobrino realized that the triumphant Church of his youth was completely old-fashioned.<sup>692</sup>

From this time onwards, Sobrino began to believe that it was necessary to awaken from the sleep of inhumanity. He found some of his fellow Jesuits already in mission in El Salvador, who spoke of the poor, injustice and above all the liberation of the poor. Among them Sobrino cites Ignacio Ellacuria and Archbishop Oscar Romero who would later be martyred. Sobrino questioned: "are we really human and, if we are also believers, is our faith human?"<sup>693</sup> The answer to this question was an awakening from a dogmatic sleep. Sobrino describes the joy he had as follows:

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<sup>692</sup> Jon Sobrino, *The Principle of Mercy: Taking the Crucified People from the Cross* (Trans. Orbis; Maryknoll, NY, NY: Orbis, 1994), vii.

<sup>693</sup> *Ibid.*

the joy which comes when we are willing not only to change the mind from enslavement to liberation, but also to change our vision in order to see what had been there, unnoticed all along, and to change hearts of stone into hearts of flesh—in other words, to let ourselves be moved to compassion and mercy.<sup>694</sup>

Sobrino discovered through his experience with the poor in El Salvador that “the world is one gigantic cross for millions of innocent people who die at the hands of executioners.”<sup>695</sup> To describe what is expressed in this previous quotation, Sobrino uses the expression “crucified peoples” borrowed from his fellow Jesuit Ignacio Ellacuria. Sobrino will develop this expression in his theology of the poor. He also discovered in El Salvador a new kind of civilization, a ‘civilisation of poverty:’ an expression he also develops in his theology. He uses the term ‘victims’ to describe the poor. In what follows, we will analyse these expressions and indeed words used by Sobrino to describe the poor.

### **6.2.1 Language of the Poor as the ‘Crucified People’ and ‘Martyred People’**

One of the terms used to speak about the Poor in Sobrino’s writings is ‘crucified people’. He acknowledges that this expression is taken from his Jesuit colleague Ellacuria who was murdered in their religious community of San Salvador in 1989. In fact, after the publication of the English translation of Jürgen Moltmann’s book entitled *The Crucified God*, in 1973, Ellacuria found it relevant to use the statement ‘crucified people’ as a theological idea. In 1977, Ellacuria published an article in Spanish entitled “El pueblo crucificado: Ensayo de soterología histórica”.<sup>696</sup> For him, the reality of those suffering around the world helps us to understand the meaning of the expression ‘crucified people’. He states: “This reality is simply the existence of a vast portion of humankind, which is

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<sup>694</sup>Ibid., 4.

<sup>695</sup>Ibid.

<sup>696</sup> Ignacio Ellacuria “El pueblo crucificado: Ensayo de soterología histórica,” in *Revista Latinoamericana de Teología*. Vol. 6, Septiembre-Diciembre, 18 (1989) 305-333.

literally and actually crucified by natural oppressions and especially by historical and personal oppressions.”<sup>697</sup>

Sobrino draws his understanding of the ‘crucified people’ from the context of Latin America where terrible material poverty is found in the victims of repression and the wars it has caused.<sup>698</sup> For the Jesuit theologian, the then situation of Latin America should be read through the lens of what happened centuries earlier especially during Spanish colonization. To illustrate his argument, he asserts that

some seventy years after 1492, the indigenous population had been reduced to 15 percent; many of their cultures had been destroyed and subjected to anthropological death. This was a colossal disaster, doubtless due to various complex causes, but nevertheless a really colossal disaster.<sup>699</sup>

According to Sobrino, it is on account of this historical disaster that the following terms were used to speak about Latin America: ‘third world’, ‘the South’, and ‘developing countries’. The simple fact of using such terms shows that there is something wrong. That is why, Sobrino used the metaphorical term ‘crucified people’. He found it fitting because it did not cover up the reality described by other terms. He justifies the use of such language by arguing that the cross refers to death, and death is what the people of Latin America are subjected to in various ways. This kind of death is a slow but real death caused by poverty, which is generated by unjust structures.<sup>700</sup> The Jesuit theologian goes further in explaining the reason why he uses the term cross to speak about the Poor: “it is useful and necessary language at the historical-ethical level because cross expresses a type of death actively inflicted. To die by crucifixion does not mean simply to die, but to be put to death; it means that there are victims and there are executioners.”<sup>701</sup> Sobrino

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<sup>697</sup>Ignacio Ellacuria, “The Crucified People” in *Mysterium Liberationis: Fundamental Concepts of Liberation Theology* (Trans. Phillip Berryman and Robert R. Barr; Maryknoll, NY: Orbis, 1993), 580.

<sup>698</sup> Sobrino, *The Principle of Mercy*, 49.

<sup>699</sup>Ibid., 51.

<sup>700</sup>Ibid., 50.

<sup>701</sup>Ibid.



accused the various empires that have exercised power over the continent of Latin America such as Spanish, Portuguese, the U.S. and its allies as crucifiers of poor people.

From a religious perspective, Sobrino perceives the crucified people as Yahweh's Suffering Servant (Isaiah 52:13-53:12). They are the principal sign of the times, the sign of God's presence in the world. In Latin America, those people are the actualization of Christ crucified, the true servant of Yahweh.<sup>702</sup> Indeed, for Sobrino "the theology of the crucified people as Yahweh's suffering servant includes not only the servant victim, which people in other situations can understand but also the servant's saving role in history: historical soteriology".<sup>703</sup>

Sobrino invites those who read the songs of Yahweh's servant to keep their eyes on the crucified people. The question here is, is it meaningful for all theologians to do so even though they are not from the Latin American context? On the one hand and as it was said previously, the reader should understand that Sobrino reflects from the context of a Latin America marked by oppression and repression in El Salvador or Guatemala and many other places. On the other hand, by imposing this unique view of how to read the text of Yahweh's servant, Sobrino's idea runs the risk of becoming dogmatic. However, as far as suffering is part of human existence, it implies that the theology of the suffering servant could also find its relevance outside of the Latin American context.

In comparison with the condition of the servant, Sobrino describes the daily material poverty of the Latin American as *ugly*. Those people are like the servants, disfigured and mutilated. They are despised and rejected because everything has been stolen from them, even their dignity. People think they do not have anything to offer to the world. In Sobrino's words: "what can the world learn and receive from them? What

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<sup>702</sup>Ibid., 51.

<sup>703</sup>Ibid.

do they offer the world for its progress, apart from their primary materials, their beaches and volcanoes, their folklore for tourists?”<sup>704</sup> Furthermore, Sobrino uses strong words to describe what happens to the crucified people when they try to stand up for their rights: "yet when they decide to live and call on God to defend them and set them free, then, they are not even recognized as God's people, and the well-known litany is intoned. They are subversives, terrorists, criminals, atheists, Marxists, and communists."<sup>705</sup> In a positive way, the crucified people, according to Sobrino, are the 'bringers of Salvation'. Based on Ellacuría's thinking, Sobrino refers to the figure of the suffering servant (Is. 52:13-53:12) as a man of suffering who is led to death by the actions of others without justice. For Sobrino, Isaiah attributes salvation to that figure of the servant, which is similar here to Third World people. This so-called "third World offers light to enable the First World to see itself as it truly is, which is an important element of salvation."<sup>706</sup> In a negative way, the concept 'crucified people' implies not only the world of material poverty and injustice but also a 'sign'. Sobrino compares them to a 'sign of the times' as expressed in *Gaudium et Spes* 4.<sup>707</sup>

Historically, Sobrino compares the crucified people to *martyrs* such as the priests, nuns, and his confreres who were killed in El Salvador in 1989.<sup>708</sup> He wonders whether

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<sup>704</sup>Ibid., 52.

<sup>705</sup>Ibid.

<sup>706</sup>Ibid., 5.

<sup>707</sup> Sobrino, *No Salvation outside the Poor*, 4.

<sup>708</sup> It should be mentioned that since 1989 there has been a noticeable shift in Sobrino's theological thought especially with the recurrence of the concept of 'martyrdom' in many of his articles. This research notes that since 1989, the year that Sobrino's Jesuit colleagues were coldly murdered, Sobrino has made martyrdom a central theme of his reflection. Considering the articles published in *Revista Latino americana de Teología* (hereafter RLT), Sobrino's articles are mostly linked to the concept of 'martyrdom'. The following survey is based on articles published from 1989 in RLT up to now. For example, in 1989, Sobrino published two articles in honour of the memory of Bishop Romero and his colleagues who were killed in his community in El Salvador. (Jon Sobrino, "Mi recuerdo de Monseñor Romero," in RLT, 16 (abril 1989), 3-44; Id., "Compañeros de Jesús. El asesinato-martirio de los jesuitas salvadoreños," in RLT, 18 (diciembre 1989), 255-304.) In 1993, Sobrino wrote an article on the relationship between Liberation theology and the theology of martyrdom (Jon Sobrino, "De una Teología solo de la liberación a una teología del martirio," in RLT, 28 (abril 1993), 27-39.) In 1998, Sobrino published another article on the process of canonization of Bishop Romero (Jon Sobrino, "Reflexiones sobre el proceso de canonización de Monseñor Romero" in RLT, 43 (abril 1998), 3-15.) A year after in 1999, he wrote on the Jesuit martyr in the so-called Third World

the seventy thousand assassinated in El Salvador and the eighty thousand in Guatemala are recognised. He also mentions some situations beyond the context of Latin America such as the children of Ethiopia and millions in India living in extreme poverty. Above all, he brings to light the assassination of the mother and daughter, Julia Elba and Celia, who were murdered with the Jesuits. He wonders whether their names are known and ever mentioned.<sup>709</sup> Sobrino perceives in the poor the presence of Christ crucified in history. He considers them as ‘*martyred people*’.<sup>710</sup> And he cogently states: “to call the peoples of the Third World ‘crucified people’, ‘Yahweh’s Suffering Servant’, ‘the presence of the crucified Christ in history,’ is the most important theological statement we can make about them. Nevertheless, I also want to call them a ‘martyred people’.”<sup>711</sup>

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(Jon Sobrino, “Los mártires jesuánicos en el tercer mundo” in *RLT*, 48 (Diciembre 1999), 237-255.) In 2000, he published on Bishop Romero as Christian, and Salvadorian and another one in November the same year on the 20<sup>th</sup> anniversary of his martyrdom. (Jon Sobrino, “Monseñor Romero Cristiano y salvadoreño” in *RLT*, 49 (abril 2000), 25-35; Id., “Monseñor Romero: exigencia y juicio y buena noticia. En el XX aniversario de sumartirio” (November 2000), 191-207.) In 2005, he wrote another article where he showed how Father Ellacuria, his Jesuit fellow who was murdered in 1989 helped to understand Bishop Romero because there is no way to speak about Bishop Romero without mentioning the poor or the crucified people which was one of the major themes of Father Ellacuria’s theology. (Jon Sobrino, “El Padre Ellacuriá sobre Monseñor Romero Ayudas para poner a producir en las iglesias la herencia de Jesús” in *RLT*, 65 (agosto 2005), 117-137.) In 2008, Sobrino wrote another article in honour of Bishop Pedro Casaldáliga, emeritus Bishop of São Félix do Araguaia (Brazil) a famous defender of Liberation theology by *RLT*. (Jon Sobrino, “La causa de los mártires Afradecimiento a Pedro Casaldáliga,” in *RLT*, 73 (enero abril 2008), 3-19.) In 2009, on the occasion of the 20<sup>th</sup> anniversary of his brother Jesuits who were killed in El Salvador. (Jon Sobrino, “Los mártires de la UCA, Exigencia y gratia,” in *RLT*, (78 (septiembre-diciembre 2009), 227-239.) In 2012, there is another paper given at the Faculty of Theology of Louvain on the Church of the poor from the perspective of Bishop Romero’s memory. (Jon Sobrino, “La Iglesia de los pobres Desde el recuerdo de monseñor Romero,” in *RLT*, 86 (mayo-agosto), 135-155.). In 2013, Sobrino wrote another article on the Influence of Bishop Romero on Ignacio Ellacuriá. In 2014, Sobrino gave a talk at the chair of contemporary theology José Antonio Romeo on the life of Bishop Romero (1917-1980). (Jon Sobrino, “Monseñor Romero (1917-1980) Ante Dios con su pueblo,” in *RLT*, 92 (mayo-agosto 2014), 119-152.) In 2015, Sobrino wrote about the legacy of martyrs for the future on the occasion of the 25<sup>th</sup> anniversary of the martyrs of the University of Central America and 35<sup>th</sup> anniversary of Bishop Romero’s murder. (Jon Sobrino, “El legado de los mártires de cara al futuro. A los 25 años de los mártires de la UCA y a los 35 de Monseñor Romero,” in *RLT*, 94 (enero-abril 2015), 5-11) In 2016, Sobrino was asked to make an assessment on the documentary called ‘El desagravio’ on the life and ministry of Bishop Romero in El Salvador. (Jon Sobrino, “El desagravio: Monseñor Romero, su pueblo y el papa Francisco” in *RLT*, 99 (septiembre-diciembre 2016), 215-221. For the 100<sup>th</sup> anniversary of Romero, Sobrino wrote in 2017 a reflection and meditation of his life (Jon Sobrino, “Reflexión-meditación sobre Monseñor Romero,” in *RLT*, 101 (mayo-Agosto 2017), 107-18.)

<sup>709</sup> Ibid.

<sup>710</sup> Jon Sobrino, *Christ the Liberator* (Trans. Paul Burns; Maryknoll, NY: Orbis 2001), 264.

<sup>711</sup> Ibid., 265.

For him, since the Second Vatican Council, Latin America is the continent, which has suffered more violent deaths than any other. The mass killing of many Christians in Latin America forced Latin American theologians to rethink their methodological approach to Christian martyrdom. Sobrino questions the canonical approach of the process of the canonization of martyrs. He wonders whether the Christians who were killed in Latin America should follow the official process of canonisation “(according to which they probably would not be martyrs) or through the death of Jesus (for which we have to change the official notion of martyrdom)?”<sup>712</sup> For Sobrino, Jesus and his Kingdom should be used as a methodological approach to the process of canonization for martyrs. This means “to go back to Jesus in order to rethink all theological realities in terms of Him.”<sup>713</sup> As he sees it,

The Latin American martyrs did die to defend the same cause as Jesus, God’s Kingdom for the poor, and they were threatened, persecuted and put to death by the anti-Kingdom (...) They are not martyrs, strictly speaking, because they defended something central to the Church, any more than Jesus could have been, but because they defended something central to God’s Kingdom.<sup>714</sup>

Sobrino also underlines that the Latin American martyrs have shone a spotlight on the limitations of the official definition of martyrdom. He is aware that his argument could be controversial. Thus, to solve the ambiguity of his own understanding of martyrdom, Sobrino suggests that the term ‘martyrdom’ should be defined not only in terms of Jesus’ death but also by analogy. He illustrates his arguments with three examples. The first example is the martyrdom of Archbishop Romero and many other priests, nuns, catechists. The second example is about the martyrdom of many Christians in the popular organisations who defend the Kingdom and are put to death. The third example is the

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<sup>712</sup> Ibid., 266. (Sobrino refers to the official definition of martyrdom as follows: “It is the free and patient acceptance of death for the cause of the faith (including its moral teaching) in its totality or with respect to a particular doctrine (but with the totality of the faith always in view).” (Ibid., 265.)

<sup>713</sup> Ibid., 266.

<sup>714</sup> Ibid., 267.

masses of innocents who are anonymously murdered.<sup>715</sup> Referring to the official definition of martyrdom, some of these three categories cannot be considered strictly as martyrs. For Sobrino, as those Christians were killed because they defended something central to the Kingdom of God, by analogy, they were martyrs. They were the crucified people, they were victims.

### **6.2.2 Language of the Poor as Victims**

In his book entitled *Christ the Liberator*, Sobrino uses this term ‘victims’ to describe the world of material poverty found in Latin America. For him, the word ‘victims’ linguistically captures the challenge that is implied by the word poor. He states: “If I have used the expression victims in the subtitle (and elsewhere the stronger one of crucified peoples) this is to rescue, at least in language, the challenge that used to be implied by the word poor.”<sup>716</sup> Sobrino also refers to the atrocity of Auschwitz as the victims. For example, he questioned like other theologians: “how to do theology after Auschwitz?”<sup>717</sup> For him, Auschwitz is a symbol of other atrocities still happening around the world. The memory of the Shoah cannot be considered only as something that happened in the past but there should be a spotlight on the new ‘Auschwitzes’. To respond to the question on how to do theology after Auschwitz, Sobrino states:

The reply has been that it is not possible to do theology over Auschwitz. Auschwitz, is, then, meta-paradigmatic; it is a powerful way of recalling the essential relationship between God and the victims. We human beings, however, are given to forgetting and capable of spoiling everything. We can even use the memory of Auschwitz to give the impression that, though horrible, it is something that happened in the past, and we can proclaim that in the new paradigm there is no reason for the recent Auschwitzes—our own—always to be centrally present. Auschwitz was the shame of human-kind half a century ago. Central America, Bosnia, Kosovo, East Timor, Rwanda, death from hunger, and now the social exclusion of tens of millions of human beings are still the shame of the human race in our day.<sup>718</sup>

Sobrino introduced and adopted this concept of ‘victims’ in reference to the poor as paradigmatic in his theology. He reflected on the relationship between the Resurrection of Jesus and the victims. For him, the relationship between the cross and resurrection is

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<sup>715</sup>Ibid., 269-270.

<sup>716</sup>Sobrino, *Christ the Liberator*, 4.

<sup>717</sup> Ibid., 6.

<sup>718</sup> Ibid., 6-7.

decisive for the understanding of the Pascal mystery. Therefore, the victims or the crucified people provide the setting from which to understand the resurrection of Jesus. He compares El Salvador to Galilee by referring to the Gospel of Mark 16:7: “But you must go and tell his disciples and Peter, “He is going ahead of you to Galilee; that is where you will see him, just as he told you.”” Commenting on this passage, Sobrino asserted: “This contains no apparitions but only the command to ‘But go [...] to Galilee; there you will see him’ (16:7). Whatever may have happened geographically and historically, Galilee is the place of the poor and the despised.”<sup>719</sup>

Sobrino compared the situation of our world to the situation of victims. He explained it by the fact that millions of human beings experience the reality of oppression, which paradoxically they have internalized. Some of them have more or less explicit awareness of this fact.<sup>720</sup> For him, victims should be central to the understanding of dogmatic texts as well as biblical texts. He declares:

This happens clearly when scriptural texts are analysed, since in them the essential relationship between God’s revelation and victims exists, and so the view of the victims shed light directly on biblical texts. The same does not happen with conciliar texts, which make no mention of the poor or victims, so the viewpoint of the victims can shed light only more indirectly on these texts.<sup>721</sup>

This understanding of the conciliar texts in relationship to the victims will be criticised by the CDF in the notification to Sobrino as pointed out in the third chapter of this thesis. Nevertheless, to describe the fact that the victims also shed light on the reality of the non-poor, Sobrino uses the term ‘Civilization of poverty.’

### **6.2.3 The Language of the Civilisation of poverty**

This phrase ‘Civilisation of poverty’ is an alternative to what Sobrino called the ‘civilization of Wealth’ of the western world. It was meant by him to help the western wealthy world or the world of abundance to keep from falling into inhumanity. The

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<sup>719</sup> Ibid., 14.

<sup>720</sup> Ibid., 222.

<sup>721</sup> Ibid.

civilization of wealth offers the opportunity to accumulate maximum capital, offers material development and temporal satisfaction. It does not provide for the basic needs of all and does not offer values that can humanize people and societies.<sup>722</sup> Quoting Ellacuría, Sobrino notes how the civilization of poverty contrasts with the civilization of wealth and it is the best way to historicise the ‘civilization of love’ as it is described in the *Compendium of the Social Doctrine of the Church* (CSDC 580-583).

Solidarity appears to be the leading theme in these numbers of the Compendium. It is promoted as the main principle that includes others. This principle is analysed from the perspective of the primacy of love based on the love shown by Jesus to his disciples in Jn 13:35: “By this everyone will know that you are my disciples, if you have love for one another.” It implies, the transformation of the world by Christians who must show by their lives how love is the only force that can transform the world. This happens only if love is present in every social relationship. Those who are responsible for the good of the people are more concerned about love. The compendium gives many names to the form of love in the context of the civilisation of love such as social charity and political charity, which are the manifestations of the same love. Those forms of love are the antithesis of what Sobrino calls the civilization of wealth based on egoism and individualism. It considers love to be an engine of the social life. Love must be the highest norm of all human activity. The consequence of including love in daily life is the practice of justice because it helps to transform our society.<sup>723</sup>

To explain the so-called ‘civilization of wealth’ Sobrino asserts:

In a world sinfully shaped by the dynamic of capital and wealth, we need to develop an opposing dynamic that can salvifically overcome it. The thesis of a civilization of poverty thus ‘rejects the accumulation of capital as the engine of history, and the possession-enjoyment of wealth as the principle of humanization; rather it makes the universal satisfaction of basic needs the principle of development, and the growth of shared solidarity the basis of humanization.’<sup>724</sup>

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<sup>722</sup>Ibid., 9.

<sup>723</sup>Pontifical Council for Justice and Peace, *Compendium of the Social Doctrine of the Church* (London: Burns & Oates, 2004), 293-296.

<sup>724</sup> Sobrino, *No Salvation Outside the Poor*, 14.

So, the civilization of poverty invites people responsible for the common wealth to guarantee the basic needs of all and the freedom of personal choices. This needs hard work so that it might become a reality. This does not mean preaching against the civilization of wealth but to create an economy, which profits all and promotes solidarity.<sup>725</sup> Sobrino, inspired by the Social Teaching of the Church, considers the principle of solidarity as essential in the civilization of poverty because it is something fundamental to Christian tradition and helps to overcome tendencies of dissociative individualism.<sup>726</sup> Social justice and solidarity are the values that can help to build the civilization of poverty. He suggests that these values relate to the reality of the Poor and the oppressed and can help to shape this civilization of poverty. It implies honesty toward realities, which avoid covering up the ugly truth of poverty and oppression. Sobrino also mentions compassion for the suffering of others and courage to denounce injustice as insights of the civilisation of poverty. The consequence is the demand for the freedom of everyone and the joy to recognize that we are brothers and sisters.<sup>727</sup> This demand for freedom and love for everyone and especially the oppressed is also expressed in the language of mercy. The principle of mercy is central in Sobrino's theological thought about the poor.

#### **6.2.4 Language of Mercy**

Sobrino's understanding of mercy is in interconnection with Liberation theology. The article on his understanding of mercy or compassion first appeared in a book edited with his Jesuit colleague Ignacio Ellacuria on the fundamental concepts of Liberation theology. His article is in the section dedicated to the spirit of Liberation.<sup>728</sup> Sobrino's quest for mercy is a call and a challenge to impact on human history. For him, "being-human-with-spirit" is to transform our society in the concrete reality because a purely

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<sup>725</sup> Ibid., 15.

<sup>726</sup> Ibid.

<sup>727</sup> Ibid., 17.

<sup>728</sup> Jon Sobrino, "Spirituality and the following of Jesus," in *Mysterium Liberationis: Fundamental Concepts of Liberation Theology* (trans. Robert R. Barr; Maryknoll, NY: Orbis, 1993), 677-701.



doctrinal theology had become irrelevant.<sup>729</sup> There is a closeness between Liberation theology and spirituality because with this interconnection, theology becomes “a response to concrete, historical reality, church reality, with its real cries and real hopes.”<sup>730</sup> Moreover, every human being is confronted to reality that means that every human being lives his or her life with spirit. In this perspective “spirituality is the spirit with which we confront the real. It is the spirit with which we confront the concrete history in which we live, with all its complexity.”<sup>731</sup> It is in this confrontation with reality and history that Sobrino situates his understanding of mercy. He speaks about honesty with the real where the truth of reality is not imprisoned by injustice. In this context, Sobrino defines mercy in the following terms:

This ethical practice of honesty is mercy or pity in confrontation with reality. Mercy, here, or compassion, is not reducible to an affective movement of the emotions, although this may accompany it. Mercy denotes a reaction in the face of the suffering of another, which one has interiorised, and which has become one and the same thing with oneself, with a view to saving that other. Mercy is the primary and ultimate, the first and the last, of human reactions.<sup>732</sup>

For Sobrino, in the exercise of mercy, the human being is perfected as Luke teaches in the parable of the Good Samaritan and Matthew in the parable of the Last Judgment<sup>733</sup> : “for I was hungry and you gave me food, I was thirsty and you gave me something to drink, I was a stranger and you welcomed me, I was naked and you gave me clothing, I was sick and you took care of me, I was in prison and you visited me. (Mt 25:35-36) The ethical dimension of mercy is rooted in the theological and Christological aspects of mercy. Todd Walatka states:

Sobrino sees mercy as the origin and constant within God’s actions toward humanity. God is the God who liberates the oppressed, who calls the prophets to speak out for the poor, and who welcomes the outcast and sinner (...) In their presence Jesus is moved with compassion and acts to alleviate their suffering.<sup>734</sup>

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<sup>729</sup> Ibid., 678.

<sup>730</sup> Ibid., 679.

<sup>731</sup> Ibid., 681.

<sup>732</sup> Ibid., 682.

<sup>733</sup> Ibid., 683. In his book on *The Principle of Mercy: Taking the Crucified People from the Cross*, Sobrino reflects on the Samaritan Church and the Principle of Mercy inspired by Luke’s parable.

<sup>734</sup> Todd Walatka, “The Principle of Mercy: Jon Sobrino and the Catholic Theological Tradition” in *Theological Studies*, 2016, Vol.77 (1), 105.

For Sobrino, the loving action of God is the origin of mercy and “it is this mercy of God that appears concretely historicized in Jesus’ practices and message.”<sup>735</sup>

Sobrino’s analysis of mercy anticipated the underlying spirit of Pope Francis’ papacy:

everything—absolutely everything—turns on the exercise of mercy. In this statement Sobrino anticipates the underlying spirit of Pope Francis’ pontificate and expresses his conviction that mercy is the fundamental reality that structures the action of God, the person of Christ, the perfection of the human person, and the mission of the church.<sup>736</sup>

The next section will analyse Francis’ language of the vulnerable, especially his language of mercy.

### **6.3 POPE FRANCIS’ LANGUAGE OF THE VULNERABLE**

The concept of vulnerability is present in Francis’ understanding of the poor and goes beyond it as he integrates new forms of human suffering such as the elderly, homeless, homelessness, spiritual worldliness and other forms of human suffering generated by climate change. Francis points out that the mission of the Church is to deal with the situation of human suffering in relation to mercy or compassion. It implies not only compassion as an affective sentiment for others, but it also leads to concrete commitment. It is because of the inclusiveness of the term and new forms of human suffering described by Francis that in this research the concept ‘vulnerable’ is used instead of ‘poor’ or ‘margins or marginalised’. This integrative view obliges an examination of Francis’ language of the vulnerable here and this proceeds in three dimensions: firstly, his pastoral and spiritual language; secondly, the language of the vulnerable in a free market society; and finally, the language of mercy.<sup>737</sup>

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<sup>735</sup> Sobrino, *Principle of Mercy*, 16-17.

<sup>736</sup> Walatka, “The Principle of Mercy: Jon Sobrino and the Catholic Theological Tradition,” 96-97. The first sentence of his quotation is from Jon Sobrino, “Spirituality and the following of Jesus,” in *Mysterium Liberationis: Fundamental Concepts of Liberation Theology* (trans. Orbis; Maryknoll, NY: Orbis, 1993), 682.

<sup>737</sup> The Faculty of Theology of the Pontifical University of Salamanca organized on October 16, 2014 a day of reflection on “Los lenguajes del Papa Francisco.” (Jacinto Nuñez Regodón ed., *Los lenguajes del Papa Francisco*, Coll. Cátedra Cardenal Ernesto Ruffini No 11; Salamanca: Universidad Pontificia de Salamanca, 2015.) In the introduction to the book presenting the various lectures given on this occasion, Jacinto Nuñez Regodón mentions that the language of the Holy Father goes beyond mere linguistic

### 6.3.2 The Pastoral and Spiritual Language

Talking about the Social Teaching of Pope Francis, the Jesuit theologian Christoph Theobald remarks that Francis' style in the texts is very close to Francis' style of speaking because the Holy Father does not only appeal to the intelligence of the reader when writing or speaking, he also engages our affectivity and our heart. This style makes things very personal for the reader to take a personal decision. To describe Francis' personal style, Alessandro Gisotti uses expressions such as: "estilo comunicativo", "la proximidad y la cultura del encuentro."<sup>738</sup> For example, Theobald compares the way Francis highlights the recipients of EG and LS:<sup>739</sup> "I invite all Christians, everywhere, at this very moment." (EG 3) and "I wish to address every person living on this planet." (LS 3) Francis engages a spiritual journey with his reader, a journey towards conversion.<sup>740</sup> And for him, the Church's commitment to the poor is rooted in the encounter with Jesus: "thanks solely to this encounter with God's Love (...) Here we find the source and inspiration of all our efforts at evangelisation. For if we have received the love, which restores meaning to our lives, how can we fail to share that love with others?" (EG 8)

From this outpouring love flowing from the encounter with Christ, Francis invites Christians to go forth to the periphery: "the Church, which "goes forth" is a community

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considerations. The study of Francis' language should consider the whole person of Bergoglio. For example, the word "porteño" is important in understanding how Pope Francis expresses himself. Indeed, this concept describes the natives of the Argentine capital, the inhabitants of the great metropolis Buenos Aires which is a cosmopolitan city. According to Regodón, a cosmopolitan city influences the inhabitants of the big capitals on their way of speaking which is very spontaneous and one finds that with the Holy Father. There is direct and spontaneous communication with Pope Francis. In addition, Regodón emphasizes that the musical formation of the Holy Father would have an influence on the simplicity of these messages even if these messages should still be interpreted. It is here that Regodón refers for example to an image such as the Church as a battlefield hospital (Ibid., 10-12.)

<sup>738</sup> Alessandro Gisotti, "El perfil Humano y Pastoral del Papa Bergoglio," in *Los lenguajes del Papa Francisco*, Coll. Cátedra Cardenal Ernesto Ruffini No 11; (Salamanca: Universidad Pontificia de Salamanca, 2015), 15. About Pope Francis' understanding of the expression "cultura del encuentro", one can consult, Gustavo Sánchez Rojas, "El Papa Francisco Y La "Cultura del Encuentro". Aspectos Teológicos de Una Enseñanza Central," in *Revista Teológica Límense*, Vol. LI-No 3, Setiembre/Diciembre 2017, 341-72.

<sup>739</sup> Christoph Theobald, "L'enseignement social de L'Eglise selon le pape François," in *Nouvelle Revue Théologique*, 138(2016), 273. For the Dominican Thomas Michelet, Pope Francis' Encyclical letter *Laudato Si'* operated a turning point in the Church like the publication of *Rerum Novarum* and *Populorum progressio*. He states : "Il n'est pas exagéré d'affirmer comme certains l'ont fait que l'encyclique *Laudato Si'* opère un tournant pour l'Eglise équivalent à celui de *Rerum novarum* (1891) et de *Populorum progressio* (1967) trois quarts de siècles après. C'est une encyclique sociale de « troisième génération », qui marque d'après nous la fin de la modernité et la nécessité d'un nouvel humanisme moins anthropocentrique." (Thomas Michelet, *Les Papes et l'Ecologie 50 ans - 50 textes : de Gaudium et Spes a Laudato si'* (1965-2015) (Paris : Groupe Artège, 2016), 47.)

<sup>740</sup> Ibid.

of missionary disciples who take the first step, (...) go out to others, seek those who have fallen away, stand at the crossroads and welcome the outcast.” (EG 24)<sup>741</sup> For him the Church must go first to the poor and the sick<sup>742</sup>, those who are usually despised and overlooked. The reason here is that “the poor are the privileged recipients of the Gospel”, and Jesus also preached to the poor as a sign of the kingdom that He came to establish.

Pope Francis uses very concrete language to express his point on these issues: “an evangelizing community gets involved by word and deed in people’s daily lives; it bridges distances, it is willing to abase itself if necessary, and it embraces human life, touching the suffering flesh of Christ in others. Evangelizers thus take on the “smell of the sheep” and the sheep are willing to hear their voice.” (EG 24)<sup>743</sup> To describe the concreteness and proximity of Francis’ language, Antonio Ávila Blanco uses the expression “un lenguaje vivo y cercano.”<sup>744</sup> The word “cercano” which also means proximity is also related to “cercanías.” For example, in Spain, the train carrying people from the centre to the periphery is called ‘cercanías.’ Francis’ language implies a concrete proximity with the sheep. To smell the sheep, someone needs to be with the sheep. The Holy Father dreams of a missionary option that engages renewal of structures by a

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<sup>741</sup> For the Church seen as a missionary disciple who goes out, there is an article of Paulo Sues where he shows that the key to understand Francis’ gestures is mercy. (Paulo Sues, “L’Église “en sortie” : La joie de l’Évangile : du vin et des gouttes d’amertume,” in *Spiritus*, 216 (04 September 2014), 263-276. Also the article of Vicente Vide Rodríguez, “Los Lenguajes de las Periferias,” in *Los Lenguajes del Papa Francisco*, 89-99. Massimo Borghesi who wrote an intellectual biography of Pope Francis remarks that Bergoglio was influenced by Amelia Podetti. She was Argentinian and after studying in Paris, she decided to go back to Argentina to challenge the hegemony of scientism and Marxism. Describing her influence on Bergoglio, Barghesi states: “A scholar of Hegel, Podetti was a major influence on Bergoglio in a key area: the “peripheries.” It was from her that the future world changes when it is looked at from the outside—from the margins, from those points of the world that are more fragile and in pain (...) Bergoglio’s entire social and Gospel vision presupposes a “peripheral” perspective – looking at the world from the point of view of those that are discarded and shut out.” (Massimo Barghesi, “Living with contradiction,” 4.)

<sup>742</sup> See Pope Francis, “Message of his Holiness Pope Francis for the Twenty-Sixth World Day of The Sick 2018,” available at [http://w2.vatican.va/content/francesco/en/messages/sick/documents/papa-francesco\\_20171126\\_giornata-malato.html](http://w2.vatican.va/content/francesco/en/messages/sick/documents/papa-francesco_20171126_giornata-malato.html) (accessed 25/01/2018).

<sup>743</sup> On EG 24, Giuseppe Merola edited Pope Francis’ speeches to Priests, Bishops, and Other Shepherds. (Giuseppe Morela, *With the smell of the Sheep: The Pope Speaks to Priests, Bishops, and Other Shepherds* (Maryknoll, NY: Orbis, 2017).

<sup>744</sup> Antonio Ávila Blanco, “Dios Primerea,” in *Los lenguajes del Papa Francisco*, 63.

pastoral conversion (EG 27). Pope Francis also invites the pastors and the faithful to accompany their brothers and sisters in need in their journey and openness to God with mercy and patience (EG 44). Encounter, encouragement and accompaniment are key words in Pope Francis' pastoral language. He enunciates:

In various countries, conflicts and old divisions from the past are re-emerging. I especially ask Christians in communities throughout the world to offer a radiant and attractive witness of fraternal communion. Let everyone admire how you care for one another, and how you encourage and accompany one another: "By this everyone will know that you are my disciples, if you have love for one another" (Jn 13:35). This was Jesus' heartfelt prayer to the Father: "That they may all be one... in us... so that the world may believe" (Jn 17:21), (EG 99).

In this perspective, Pope Francis wants a Church whose doors are always wide open: "the Church is not a tollhouse; it is the house of the Father, where there is a place for everyone, with all their problems." (EG 47) The Church should go to everyone without exception and especially the poor (EG 48). The Church should go forth to communicate the life of Jesus Christ to everyone.<sup>745</sup> This suggests leaving structures, which give a false sense of security, rules, which make Christians harsh judges of others as well as to adopt habits, which make them safe to go and encounter people who are starving at their doors. Reminding us of what he used to say to the priests and laity of Buenos Aires, Francis affirms that he prefers a "Church, which is bruised, hurting and dirty because it has been out on the streets, rather than a Church, which is unhealthy from being confined and from clinging to its own security"<sup>746</sup>. That is why Francis challenges the Church to have a closeness and to pay more attention to broken families.

Pope Francis invites pastors to accompany families who have experienced breakdown and divorce. For him, this is "the logic of pastoral mercy" (AL 307-12). The

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<sup>745</sup> Francisco José Andrales Ledo also reflected on the Pastoral language of Francis in EG. (Francisco José Andrales Ledo, "Iglesia en Misión: El "Lenguaje" Pastoral de *Evangelii Gaudium*," in Los lenguajes del Papa Francisco, 33-61.

<sup>746</sup> See Thomas P. Rausch and Richard R. Gaillardetz, eds., *Go Into the Street! The Welcoming Church of Pope Francis* (New York: Paulist, 2016).

theme of mercy in relationship to Francis' pastoral approach will be developed in the third section of this research. Talking about pastoral accompaniment of broken families, Francis calls on "the local community and pastors to accompany these people with solicitude, particularly when children are involved or when they are in serious financial difficulty." (AL 241-242) What Francis describes here was also present in EG when the Holy Father pleaded for the formation of ordained ministers and other pastoral workers in spiritual accompaniment:

The Church will have to initiate everyone – priests, religious and laity – into this "art of accompaniment" which teaches us to remove our sandals before the sacred ground of the other (cf. Ex 3:5). The pace of this accompaniment must be steady and reassuring, reflecting our closeness and our compassionate gaze which also heals, liberates and encourages growth in the Christian life (EG 169).

The Church should be the voice of those who are vulnerable especially the voice of children who often suffer in silence (AL 246). Family breakdown can become traumatic and painful if families experiencing it are economically poor and have far fewer resources at hand to start a new life. That is why the Holy Father considers that "a poor person, once removed from a secure family environment, is doubly vulnerable to abandonment and possible harm." (AL 242) Families thus need pastoral care and they themselves are indeed agents of pastoral activity as Francis echoes:

The family is thus an agent of pastoral activity through its explicit proclamation of the Gospel and its legacy of varied forms of witness, namely solidarity with the poor, openness to a diversity of people, the protection of creation, moral and material solidarity with other families, including those most in need, commitment to the promotion of the common good and the transformation of unjust social structures (AL 290).

This shows not only the importance of family in pastoral activity but also that families are the place where the protection of our common home, in solidarity with those in need, should start.<sup>747</sup> For Francis "Genuine spiritual accompaniment always begins and

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<sup>747</sup> Talking about the relationship between family and the protection of creation, Pope Francis states: "In family too, we can rethink our habits of consumption and join in caring for the environment as our common home. The family is the principal agent of an integral ecology, because it is the primary social subject

flourishes in the context of service to the mission of evangelization.” To describe this spiritual accompaniment in the context of service to the mission of evangelization, Francis states “Missionary disciples accompany missionary disciples.” (EG 173)

Concerning the challenges faced by pastoral workers in the context of globalisation, Pope Francis acknowledges the contribution of the Church to today’s society. He acknowledges that many Christians have given and continue to give their lives in love to help others in the world. In his words: “they help so many people to be healed or to die in peace in makeshift hospitals. On the one hand, the pastoral workers are present to those enslaved by different addictions in the poorest places on earth.” (EG 76) On the other hand, the dangers of falling into practical relativism (acting as if there is no God), can lead the pastoral workers to make decisions as if the poor did not exist (EG 80).

The Church should continue to be attentive to the cry of the poor, fight against the structural causes of poverty and promote the integral development of the poor. Francis lays emphasis on the principle of solidarity, which goes beyond a few acts of generosity. It should become a “spontaneous reaction by those who recognise that the social function of property and the universal destination of goods are realities, which come before private property.” (EG 188-89). Pope Francis repeats again and again that the cry of the poor should be heard (EG 190-96). He also recalls the special place of the poor in God’s people (EG 197-201).

The Pope pleads for an immediate resolution of the structural causes of poverty because our society needs to be cured of a sickness that weakens it and also leads it to new crises. The Holy Father vehemently rejects the absolute autonomy of markets and

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which contains within it the two fundamental principles of human civilization on earth: the principle of communion and the principle of fruitfulness.” (AL 277) In this quotation can be perceived a link between *Laudato Si’* and *Amoris Laetitia*. For Francis, the defence of our common home starts in the family considered as the principal agent of an integral ecology.

financial speculation. For him, they lead to the structural causes of inequality. As far as the dignity of each person and the pursuit of the common good are at stake, decisions should be taken for “better distribution of income, the creation of sources of employment and an integral promotion of the poor, which goes beyond a simple welfare mentality.” (EG 204)

Francis also invites the church to accompany women in difficult situations because the Church has “done little to adequately accompany women in very difficult situations, where abortion appears as a quick solution to their profound anguish, especially when the life developing within them is the result of rape or a situation of extreme poverty.” (EG 214)<sup>748</sup> This is what Francis calls the prophetic dimension of the Church. The Church that takes as a starting point a missionary conversion by everyone in the Church, and the Church that proclaims not a theoretical message without connection to people’s real problems. This Church must “denounce cultural, social, political and economic factors—such as the excessive importance given to market logic<sup>749</sup>—that prevent authentic family life and lead to discrimination, poverty, exclusion and violence.” (AL 201) This pastoral language is rooted in the spiritual language of Francis. It is from the encounter with Christ that Pastors can find strength to accompany those in need. To describe this encounter with Christ a priori in Francis’ pastoral vision, Alessandro Gisoti uses expressions such as: “Dios primerea, Dios nos ‘precede’, nos ‘anticipa’.”<sup>750</sup>

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<sup>748</sup> This quotation reminds us of the current debate in Ireland about the repeal or the replacement of the Eighth Amendment in the Irish Constitution. Some Christian thinkers are also interested on what is going on such as: John Scally, “Considering the Eighth Amendment, A Plea for a Measured Debate,” in *Doctrine & Life*, (April 2017). John Mangan, “Amoris Laetitia and Current Debates in Ireland on Divorce and Abortion,” in *Doctrine & Life*, Vol. 67, (July-August 2017), 29-41.

<sup>749</sup> Also understand as “Consumerism”

<sup>750</sup> Gisoti, “El Perfil Humano y Pastoral de Papa Bergoglio,” 16.



That is why Kasper finds the Kerygma central in Francis social thought.<sup>751</sup> Analysing Pope Francis' social and theological thought, Theobald also remarks that the social teaching of Pope Francis could be summed up as 'the Gospel of the Reign of God' because Francis' social teaching is inherent to the proclamation of the Good News of the Kingdom.<sup>752</sup> For example, even though EG highlights the Proclamation of the Kingdom in Chapter 3, Chapter 4 on the Social dimension of Evangelization should be read in relation to the previous chapter on the Proclamation of the Kingdom because the social dimension of Evangelisation is intrinsically linked to the proclamation of the Gospel.<sup>753</sup> He quotes EG to buttress the point: "the kerygma has a clear social content: at the very heart of the Gospel is life in community and engagement with others. The content of the first proclamation has an immediate moral implication centred on charity." (EG 177)

EG shows not only the connection between the Kerygma and the social dimension of the Gospel but also how the social dimension is part of the Kerygma. Francis states:

Reading the Scriptures also makes it clear that the Gospel is not merely about our personal relationship with God. Nor should our loving response to God be seen simply as an accumulation of small personal gestures to individuals in need, a kind of "charity à la carte", or a series of acts aimed solely at easing our conscience. The Gospel is about the kingdom of God (cf. Lk 4:43); it is about loving God who reigns in our world. To the extent that he reigns within us, the life of society will be a setting for universal fraternity, justice, peace and dignity. Both Christian preaching and life, then, are meant to have an impact on society. We are seeking God's kingdom: "Seek first God's kingdom and his righteousness, and all these things will be given to you as well" (Mt 6:33); (EG 180).

In the light of this interconnection between the Proclamation of the Gospel and the social dimension of the Gospel, Pope Francis defines what should be the specificity of the Christian lifestyle. The specificity of the Christian lifestyle is based on what

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<sup>751</sup> Kasper, 12.

<sup>752</sup> Christoph Theobald, "L'enseignement social de l'Eglise selon le Pape François," in *La pensée sociale du pape François* (Paris : Jésuites, 2016), 13.

<sup>753</sup> Ibid.

Theobald called ‘style de vie de l’Évangile’ in reference to EG.<sup>754</sup> He describes it by some expressions such as: the inclusion of the poor in society (EG 186-216) and the concern for the vulnerable (EG 209-216).<sup>755</sup> Theobald also asserts that the lifestyle of the Gospel expressed in EG 168 should be put in relationship with the “principle of the primacy of grace”, which constantly enlightens Francis’ reflections on evangelization (EG 112) and the Sacrifice of Jesus on the cross, which is the highest model that should be followed in Evangelisation (EG 269).<sup>756</sup> What Theobald describes here had already appeared in the Aparecida Document 384-85. The option for the poor and the commitment for justice is included in the Gospel of the Kingdom of God. This vision is also inherited from Pope Benedict XVI who highlighted it in his letter at the beginning of the Aparecida meeting in 2007.

In a word, there is an interconnection between Francis’ pastoral approach and his spiritual approach. The art of accompaniment, and the culture of encounter are rooted in the personal encounter of the pastors with Jesus. This could also be seen through the lens of Francis’ invitation at the beginning of his papacy: “I invite all Christians, everywhere, at this very moment, to renewed personal encounter with Jesus Christ, or at least an

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<sup>754</sup> “As for the moral component of catechesis, which promotes growth in fidelity to the Gospel way of life, it is helpful to stress again and again the attractiveness and the ideal of a life of wisdom, self-fulfilment and enrichment. In the light of that positive message, our rejection of the evils which endanger that life can be better understood. Rather than experts in dire predictions, dour judges bent on rooting out every threat and deviation, we should appear as joyful messengers of challenging proposals, guardians of the goodness and beauty which shine forth in a life of fidelity to the Gospel.” (EG 168)

<sup>755</sup> *Ibid.*, 15.

<sup>756</sup> *Ibid.*, 14. Also see “Jesus himself is the model of this method of evangelization which brings us to the very heart of his people. How good it is for us to contemplate the closeness which he shows to everyone! If he speaks to someone, he looks into their eyes with deep love and concern: “Jesus, looking upon him, loved him” (Mk 10:21). We see how accessible he is, as he draws near the blind man (cf. Mk 10:46-52) and eats and drinks with sinners (cf. Mk 2:16) without worrying about being thought a glutton and a drunkard himself (cf. Mt 11:19). We see his sensitivity in allowing a sinful woman to anoint his feet (cf. Lk 7:36-50) and in receiving Nicodemus by night (cf. Jn 3:1-15). Jesus’ sacrifice on the cross is nothing else than the culmination of the way he lived his entire life. Moved by his example, we want to enter fully into the fabric of society, sharing the lives of all, listening to their concerns, helping them materially and spiritually in their needs, rejoicing with those who rejoice, weeping with those who weep; arm in arm with others, we are committed to building a new world. We do so not from a sense of obligation, not as a burdensome duty, but as the result of a personal decision which brings us joy and gives meaning to our lives.” (EG 269).

openness to letting him encounter them.” (EG 3). From this encounter with Jesus, Christians are invited to have compassionate care for the vulnerable. The next section will highlight this invitation of the Holy Father to all Christians to have compassionate care for the vulnerable.

### **6.3.3 The Language of the Vulnerable in the Free Market Society**

Theobald notes that Francis’ concern for the vulnerable is two-sided: human fragility and creation.<sup>757</sup> The explicit summary of his thinking on vulnerability is found in EG, which is considered as the ‘manifesto’<sup>758</sup> of his papacy (EG 206-216). It reads thus:

Jesus, the evangelizer *par excellence* and the Gospel in person, identifies especially with the little ones (cf. Mt 25:40). This reminds us Christians that we are called to care for the vulnerable of the earth. But the current model, with its emphasis on success and self-reliance, does not appear to favour an investment in efforts to help the slow, the weak or the less talented to find opportunities in life (EG 209).

The Holy Father points out new categories of vulnerability in today’s world such as “the homeless, the addicted, refugees, indigenous peoples, the elderly who are increasingly isolated and abandoned, and many others” (EG 210). He considers care for the elderly as an ecclesial challenge in modern society. The elderly should be seen as ‘a sign of the times’ because “they bring with them memory and the wisdom of experience” (EG 98). Francis emphasises their growing number and remarks that they are vulnerable, dependent and at times unfairly exploited simply for economic advantage (AL 48). Referring to Psalm 71:9, Francis underlines the plea of the elderly who fear being forgotten. He declares: “God asks us to be his means of hearing the cry of the poor, so too he wants us to hear the cry of the elderly” (AL 191.)

Pope Francis invites Christians to have a special place for the poor and a concern for the vulnerable because “our faith in Christ, who became poor, and was always close

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<sup>757</sup> Theobald, 276.

<sup>758</sup> Donal Dorr, *Option for the Poor and for the Earth*, 392.

to the poor and the outcast, is the basis of our concern for the integral development of society's most neglected members." (EG 186) He calls on individual Christians as well as the community to be a tool of God for the promotion and liberation of the poor in our society. Christians should be attentive to the cry of the poor. According to Francis, Christians' lack of solidarity with the poor affects their relationship with God because Christians cannot pretend that they love God when they do not love their neighbour who is in need (EG 187).

Concerning the situation of migrants, he invites all countries to a generous openness. In his message for the 104<sup>th</sup> World Day of Migrants and Refugees, Francis suggests a shared response to the situation of migrants and refugees by four verbs: "to welcome, to protect, to promote and to integrate."<sup>759</sup> Migration also has negative effects on families because it affects them in different parts of the world, especially forced migration of families, "resulting from situations of war, persecution, poverty and injustice." (AL 46) For Francis, it is another sign of the times to be faced by the Church today because migration, "extreme poverty and other situations of family breakdown sometimes even lead families to sell their children for prostitution or for organ trafficking."<sup>760</sup>

Pope Francis highlights other forms of human vulnerability such as "those who are victims of various kinds of human trafficking (...) those women who endure situations of exclusion, mistreatment and violence, (...) unborn children." (EG 211-13). He writes: "There are other weak and defenceless beings who are frequently at the mercy of economic interests or indiscriminate exploitation. I am speaking of creation as a whole."

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<sup>759</sup> Pope Francis, "Message of His Holiness Pope Francis for the 104<sup>th</sup> World Day of Migrants and Refugees," in *Parish Resource Pack*, 14 January 2018, 4.

<sup>760</sup> There are a few articles analysing Francis' vision on migration such as: Albin Michel, *Pape François: L'amour est Contagieux: l'Évangile de la Justice*, (Paris, Albin Michel, 2015), 131-139; Mathew Tan, "The Migrant and the Latin Church" in *Radically Catholic in the Age of Francis* (Lexington, KY: Solidarity Hall, 2015), 177-184.

(EG 215) Francis also mentions loneliness as a form of vulnerability. He asserts: “one symptom of the great poverty of contemporary culture is loneliness, arising from the absence of God in a person’s life and the fragility of relationships.” (AL, 43). He underlines the weakening of faith and religious practice that affect some societies as another form of vulnerability.<sup>761</sup>

The Pope notes another contemporary form of vulnerability provoked by war, terrorism and organised crime: “societies experiencing violence due to war, terrorism or the presence of organised crime are witnessing the deterioration of the family, above all in large cities where, on their outskirts, the so-called phenomenon of ‘street-children’ is on the rise.” (AL 45)<sup>762</sup> When describing the situation of families living in extreme poverty and great limitations, Pope Francis refers to the situation of single mothers and the struggles they go through as they raise the children by themselves (AL 49). Talking about Love within the family, Pope Francis invited married couples to solidarity with the poor. For Francis, “love is called to bind the wounds of the outcast, to foster a culture of encounter and to fight for justice (...) open and caring families find a place for the poor and build friendship with those less fortunate than themselves.” (AL 183)

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<sup>761</sup> For the weakening of faith and religious practice in the Irish Society there are comprehensive articles in the *Irish Quarterly review of Studies* for Spring 2017. For example, Vincent Twomey reviews his book entitled *The end of Irish Catholicism?* His book’s purpose was to attempt to identify the cause or causes of the present malaise in the Catholic Church of Ireland. He underlines the scandals that had happened in the Catholic Church in Ireland, but he also adds other causes such as: An anti-intellectual bias which is manifested in the lack of self-criticism. As solutions, he suggests for example to promote the talents of the faithful in the parishes, to revive the liturgy and to offer more theological training for the faithful. (Vincent Twomey, “The End of Irish Catholicism? Fifteen Years On,” 39-48.

<sup>762</sup> As Pope Francis speaks about the phenomenon of ‘street-children’, it should be underlined that the phenomenon is real in Cameroon. As a member of the Priests of the Sacred Heart from Cameroon, we have in Cameroon a social structure calls JED, in French ‘Jeunesse En Difficultés’. JED was created in 1988 by the SCJs. The objective of setting up this social structure was to welcome young people from the region with a disability or a difficult family background in order to offer them a place of training and professional insertion in building, sewing, cooking, carpentry and metalworking. This mission to care for the youth in difficulty is in line with the grace and the mission received by our founder. The Priests of the Sacred Heart (SCJ) is an international religious order founded by the Frenchman Leo John Dehon in 1878 at Saint-Quentin in the North of France. Our commitment to the poor in Cameroun follows the intuition and mission received by our founder to live in real solidarity with all. The mission of the Priests of the Sacred Heart “entailed Eucharistic adoration, as an authentic service of the Church (cf Notes Quotidiennes, 1.3.1893), and ministry to the lowly and the humble, the workers and the poor.” (Priests of the Sacred Heart, *SCJ Constitutions: Rule of Life, General Directory* (Wisconsin: United States Province, 2011), no 31.)

He invites families to be the voice of the voiceless, Christian marriages should show their faith and active hope by expressing their concern and by their outspokenness on behalf of the underprivileged (AL 184.) To support the social dimension of the faith of married couples, Pope Francis refers to 1 Corinthians 11: 17-34. In this passage, Saint Paul denounces the shameful situation in the community where “the wealthier members tended to discriminate against the poorer ones, (...) While the rich enjoyed their food, the poor looked on and went hungry” (AL 185) In the light of this exhortation, Francis invites families to enlarge the small circle of their families and to open their doors to those who need support. The examples he gives here are: “teenage mothers, children without parents, single mothers left to raise children, persons with disabilities, young people struggling with addiction, the unmarried, separated or widowed women who are alone, and the elderly and infirm who lack the support of their children” (AL 197).<sup>763</sup>

Pope Francis also talks about the right of families to possess dignified or affordable housing (AL, 44). For example, he mentions the lack of housing as one of the problems not only in rural areas but also in the large cities. He underlines the fact that the state is not doing enough to provide better houses, and this affects not only the poor but many other members of the society. He says clearly that having a home relates to a sense of personal dignity and the growth of the family. For him, it is the major issue for human ecology. Moreover, if poor people who live in unsanitary slums are to be relocated, the state should provide adequate information beforehand and the people directly involved must be part of the process (LS 152). Francis considers this as a preferential option for the poorest in society.

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<sup>763</sup> One might ask whether this is possible, but in our opinion, it can be said that the Pope challenges families to live the social gospel and the principle of Solidarity.

Indeed, the option for the poor is an ethical imperative essential to attain the common good. It is not only a matter of helping the poor, but it is the consequence of an appreciation of the immense dignity of the poor in the light of Christian faith. It is the occasion to stand up as believers in societies where injustices abound, and where growing numbers of people are deprived of basic human rights (LS 158). Francis extends his message about the new categories of the vulnerable in today's world to the whole creation. He denounces the abusive exploitation of nature with consequences of desertification of the soil, pollution. This abusive exploitation of nature is also the consequence of the consumerist society. For this reason, Francis denounces the danger of consumerism. For him consumerism does not include the Poor. It appears that with consumerism the human inner life is caught up in its own interests and concerns. Therefore "there is no longer room for others, no place for the poor." (EG 2).

Climate change has grave implications for our society but especially for the poor because those who are poor do not have financial resources, which enable them to adapt to climate change. In fact, the consequences of global warming are already visible on the poor. It is manifested by the fact that animal and plant migrations affect the poor's production and it results in increasing the number of migrants fleeing poverty (LS 25). Another serious consequence of global warming is the decrease of natural resources. The paradox is that "the exploitation of the planet has already exceeded acceptable limits and we still have not solved the problem of poverty" (LS 27).<sup>764</sup> He also notes the problem of water quality arising in large cities and pleads for more funds dedicated to clean water in

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<sup>764</sup> The problem of poverty caused by climate change as described by Pope Francis is happening in the far North of Cameroon. In that region, the Cameroonians living there are experiencing a drought. They have just three months of rainy season out of twelve months. They must cultivate what they need to survive during a year in three months within the rainy season. There is a similar situation in the East region of Cameroon with deforestation. Some powerful international companies use the forest abusively and after their departure the population continues to suffer from extreme poverty. All the profits made by such companies are sent to their countries of origin.

poor areas.<sup>765</sup> He clearly affirms that “our world has a grave social debt towards the poor who lack access to drinking water, because they are denied the right to a life consistent with their inalienable dignity. This debt can be paid partly by an increase in funding to provide clean water and sanitary services among the poor” (LS 30)

Speaking of global change, Francis emphasizes the effects of some technological innovations, which have as consequences social exclusion and social problems. This reflects a real social degradation (LS 46) and affects the most vulnerable in the world. The example taken by the pope is the depletion of fish stocks, which affects those who live from artisanal fishing. Also, water pollution affects the poor who do not have the opportunity to purchase bottled water. The other impact of the current climate change is the premature death of many poor people. This happens in conflicts generated by the lack of resources (LS 48).

Michael S. Northcott describes Francis’ concern for the damaging costs of the planet and its consequences for the poor in the following terms: “for Francis, the clearest sign that “our common home is falling into serious disrepair” and is already “reaching a breaking point” (LS 61) is the contemporary migration crisis, which is characterized by a “tragic rise in the number of migrants” fleeing “growing poverty caused by environmental degradation” (LS25)”<sup>766</sup> Francis suggests the lifestyle of the Gospel, which is the specificity of Christian life as a redemptive alternative to the society of

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<sup>765</sup> Even though it is part of their charism, it should also be mentioned the pastoral commitment of the Priests of the Sacred Heart of Jesus (hereafter as SCJ) in Cameroon. As a member of this religious Congregation, I testify that in the last decade and more the SCJs have helped many people in Cameroon to get clean water through the contributions and generosity of many in western Europe especially the Bishop’s Conference of Italy.

<sup>766</sup>Michael S. Northcott, “Planetary Moral Economy and Creaturely Redemption in *Laudato SI*,” in *Theological Studies*, 2016, Vol. 77(4), 889. In an article, Peter C. Phan demonstrates the positive face of migration and he speaks about the theology of migration. He calls God the migrant and asserts that it is because of migration that Christianity arrived in the US. The Church in the US is an Institutional Migrant and God-on-the-Move. For him, the Christian God is a “mover” *par excellence*. The typical example is Jesus, Son of God and God as paradigmatic Migrant (Mt 2: 13-14) (Peter C. Phan, “Deus Migrator—God the Migrant: Migration of Theology and Theology of Migration” in *Theological Studies*, 2016, Vol. 77(4), 862.)



consumerism. It is what Francis calls a ‘new lifestyle’ in opposition to a ‘consumerist lifestyle’ (LS 204).<sup>767</sup> The Holy Father is convinced that everything is linked worldwide and that is why there is an “intimate relationship between the poor and the fragility of the planet” (LS 16). Francis also notes that a wholesome social life can flourish in the environment of the poor. Despite their poverty, poor people can build warm relationships even in an atmosphere of asphyxiation brought on by densely populated residential areas. The limitations of the environment are compensated by a network of solidarity and belonging. It is what the Pope calls human ecology because “any place can turn from being a hell on earth into the setting for a dignified life” (LS 148).

Francis denounces the throwaway culture, which affects the excluded just as it quickly reduces things to rubbish (LS 22). That is why he criticizes the economy of exclusion because such an economy kills.<sup>768</sup> The consequence of such an economy is inequality. He wonders why an elderly homeless person who is dying of exposure cannot be a news article while the stock market by losing two points is much more considered one. For him, this means clearly a case of exclusion (EG 53). Besides, Francis wonders how the world can continue to stand by when food is thrown away while people are starving. He calls it inequality. How does he describe the economy of exclusion?

Francis perceives this economy of exclusion in terms of the laws of competition and the survival of the fittest, where the powerful feed upon the powerless. The consequences are the exclusion and marginalisation of masses of people. They find themselves without work, without possibilities and without any means of escape. It

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<sup>767</sup>Ibid. To describe this new lifestyle, Donal Dorr uses the expression “affective ecological conversion.” (Donal Dorr, “Pope Francis on Falling in Love with Nature,” in *The Furrow*, Vol. 69, 3 (March 2018), 158.

<sup>768</sup> About this statement see the book: Andrea Tornelli and Giacomo Galeazzi, *This Economy kills: Poor Francis on Capitalism and Social Justice* (Trans. Demetrio S. Yocum; Minnesota: Liturgical Press, 2015). Also see Martin Schlag, *The Business Francis Means: Understanding the Pope’s message on the Economy* (Washington: The Catholic University of America, 2017), 98. Thomas R. Rourke, *The Roots of Pope Francis’s Social and Political Thought: From Argentina to the Vatican*, (London: Rowman & Littlefield, 2016), 167-194.

appears that human beings have become “consumer goods to be used and then discarded” (EG 53). Society has created a ‘disposable’ culture, which is spreading. It goes beyond simply exploitation and oppression. The ‘disposable’ culture supports the attitude that “those excluded are no longer society’s underside or its fringes or its disenfranchised—they are no longer even a part of it. The excluded are not even the ‘exploited’ but they are the outcasts, the ‘leftovers’” (EG 53) This is the bitter truth of what Francis calls the economy of exclusion.

The excluded are victims of a globalisation of indifference, which sustains a lifestyle of selfishness. In this kind of globalisation, Christians end up being incapable of feeling compassion for the outcry of the poor (EG 54). Francis denounces a financial system, which rules rather than serves. For him, “not to share one’s wealth with the poor is to steal from them and to take away their livelihood” (EG 57). He preaches an ethical approach to economics and finance. He reminds us that he loves everyone, rich and poor alike, but at the same time he urges the rich to help, respect and promote the poor. He encourages the rich to be generous with the poor and he also promotes solidarity with the poor (EG 58).

The eradication of exclusion and inequality is the dream cherished by the Holy Father to tackle the problem of violence. For him, without equal opportunities the different forms of aggression and conflict will continue to grow and eventually explode. He describes how this happens when a society, whether local or national is willing to leave a part of itself on the margins. The consequences are that such a society provokes a violent reaction from those excluded from the system. Pope Francis denounces the socioeconomic system of such a society as unjust at its roots (EG 59). For him, such societies and socioeconomic systems cannot solve the problems of people but only give false hopes; making the people feel happy, even though they are never happy. In the end,

war and violence, not by choice but by desperation, are the only ideas left in the minds of the excluded. Far from providing solutions to human problems, the Pope argues, weapons of mass destruction only end up creating new and more serious problems (EG 60).

Exploring some cultural challenges, the Holy Father also highlights the proliferation of new religious movements because of the human reaction to a materialistic and consumerist society. This, as he sees it, “is also a means exploiting the weakness of people living in poverty and on the fringes of society; people who make ends meet amid great human suffering and are looking for immediate solutions to their needs.” (EG 63) He denounces the fact that the problems of the excluded are not always at the centre of the agendas of political and economic debates of the world. For him, the world is not always clearly aware of the problems of the excluded. The poor’s problems arise as an extra to the political and economic debates that are often relegated to the last place. Francis mentions clearly that “their problems are brought up as an afterthought, a question, which gets added almost out of duty or in a tangential way, if not treated merely as collateral damage.” (LS 49) Yet the poor are most of the planet’s population. It is obvious that “a true ecological approach always becomes a social approach; it must integrate questions of justice in debates on the environment, so as to hear both the cry of the earth and the cry of the poor.” (LS 49)

In addition, Francis condemns the international pressure of developed countries on the poor countries. They impose strong conditions for economic assistance to the poor countries, such as a reduction in the birth rate. Francis says that this is a way of escaping the problem. Quoting the *Compendium of the Social Teaching*, the Pope maintains that demographic growth is fully compatible with an integral and shared development. For Francis, the major problem is the extreme and selective consumerism of some developing

countries, which refuse to face the issues. Besides, the planet cannot contain the waste products of such consumption. For him, “whenever food is thrown out it is as if it were stolen from the table of the poor” (LS 50).

Francis proposes the ethics of international relations to tackle the inequality, which affects not only individuals but the entire world. He invites us to consider the commercial imbalances, which also affect the environment. He calls it ‘ecological debt,’ which is caused by the disproportion of the use of natural resources between the global north and south. Indeed “the warming caused by huge consumption on the part of some rich countries has repercussions on the poorest areas of the world, especially Africa” (LS 51). The Holy Father criticizes some international companies or multinationals, which operate in poor countries in ways they could never do at home. When those multinationals cease their activity and go back, they leave behind them huge consequences such as unemployment, abandoned towns, the reduction of natural reserves, deforestation, and the impoverishment of agriculture.<sup>769</sup>

Francis points out that the foreign debt of the poor countries has become a way of controlling them. In addition, the system of commercial relations and ownership are structurally perverse. The Pope invites the developed countries to help pay this debt by limiting their consumption of non-renewable energy and by assisting poorer countries to support policies and programmes of sustainable development. Another issue is that the poor countries are not able to adopt the new models for reducing environmental impact

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<sup>769</sup> The situation described by Pope Francis reflects the experience of the population of East Cameroon. See <http://www.slateafrique.com/80919/deforestation-bassin-congo-pauvrete-environnement> (accessed 19/07/2017). It is a documentary produced by the French NGO “Les amis de la terre” on how the international companies leave behind them poverty and misery. There is also another documentary by the French television France 24 on how the pygmies of East Cameroon are dying because of the deforestation made by powerful international companies. (France 24, “Focus” available at <http://www.france24.com/fr/20170713-focus-cameroun-deforestation-pygmees-baka-sedentarisation-alcool-drogues> (accessed 19/07/2017) Also see María Teresa Dávila, “The option for the poor in *Laudato Si'*: Connecting care of creation with care for the poor,” in *Theological and Ecological Vision of Laudato Si': Everything is Connected* (London: Bloomsbury T & T Clark, 2017), 145-59.

because there is a lack of formation and the problem of covering their costs. Supporting the United States bishops, Francis acknowledges that greater attention must be given to the needs of the margins, and the world should develop the conviction that there is only one human family without frontiers or barriers (LS 52).

The Holy Father remarks that the culture of relativism drives people to take advantage of others, to treat them as mere objects. It leads to the sexual exploitation of children and the abandonment of elderly people. The same relativistic logic leads to human trafficking or to the buying of the organs of the poor for resale or use in experimentation. Francis invites us to objective truths or sound principles, which could oppose the ‘use and throw away’ logic (LS 123). One of the key principles that Francis suggests as an alternative to the throw away culture is the principle of mercy to which we now turn our attention.

### **6.3.4 Pope Francis’ Language of Mercy**

The key to the Church’s mission is mercy, which is the fruit of its own experience of the power of the Father’s infinite mercy. For the Holy Father, “God never tires of forgiving us; we are the ones who tire of seeking his mercy. Christ, who told us to forgive one another “seventy times seven” (Mt 18:22) has given us his example: he has forgiven us seventy times seven.” (EG 3). Moreover, “an evangelising community gets involved by word and deed in people’s daily lives, it bridges distances, it is willing to abase itself if necessary and it embraces human life, touching the suffering flesh of Christ in others” (EG 24). Mercy has become the key of Pope Francis’ papacy and for him mercy is the greatest of all the virtues (EG 37).<sup>770</sup>

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<sup>770</sup> There are comprehensive recent writings on the concept of mercy in general and in Pope Francis’ thought: It should be mentioned here the *Bull of Indiction of the Extraordinary Jubilee of Mercy Misericordiae Vultus* at the beginning of the Year of Mercy and at the conclusion of this same year, the Apostolic Letter *Misericordia et Misera*. There is other literature such as: Andrea Tornielli, *Pope Francis: The Name of God is Mercy* (Trans. Oonagh Stransky; London: Bluebird, 2016). A collection of Francis’

Accordingly, “the Church must be a place where mercy is freely given, where everyone can feel welcomed, loved, forgiven and encouraged to live the good life of the Gospel.” (EG 114). It is also very clear for the Holy Father that the work of mercy is rooted in the scriptures because there is an interconnection between the message of salvation and genuine fraternal love. Mercy also implies living the Gospel of fraternity and Justice (EG 179, 188). In this way, conceptual tools should not be an obstacle to connect us to the reality of the poor:

conceptual tools exist to heighten contact with the realities they seek to explain, not to distance us from them. This is especially the case with those biblical exhortations which summon us so forcefully to brotherly love, to humble and generous service, to justice and mercy towards the poor (EG 194).

For Pope Francis, the fact that God shows the poor his mercy first implies that Christian faith should be inspired by the divine preference for the poor because mercy towards the needy is the key for Heaven (EG 197-8). Moreover, if Christians learn to share the gaze of Christ, our society will experience its benefit. It also means that Christians should be moved by compassion, love and mercy for everyone marginalised in our society. It is what Walter Kasper calls “the fervent revolution of tenderness and Love.”<sup>771</sup> Pope Francis also expresses this compassionate care for creation in terms of

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message on mercy with the introduction by the Jesuit James Keenan. (Pope Francis, *The Works of Mercy* (Maryknoll, NY: Orbis, 2017).) Anna Maria Foli also collects six interesting messages of Francis on mercy in *Pape François, L'Amour est contagieux: L'Évangile de la Justice*, 185-91. There is another collection of Pope Francis' message on mercy by Bayard Edition in *Pape François, Miséricorde: Qui suis-je pour juger?* (Paris: Bayard, 2016). Also see the postscript of Kevin O’Gorman’s book where he looks at Mercy and Luke through Pope Francis’ lens. (Kevin O’Gorman, *Remembering God’s Mercy: Luke’s Virtue of Compassion* (Maynooth: Saint Paul, 2015), 163-71.) Nicolas Senèze, *Les Mots du Pape* (Paris: Bayard, 2016), 279-320. Papa Francisco, *La Misericordia Que Salva: Las palabras del Papa Francisco: Del 18 de mayo de 2016 al 23 de noviembre de 2016* (Romana: Vaticana, 2017). There are recent articles from the Theological Committee of the Irish Episcopal Conference. (Mary McCaughey, ed., *Merciful like the Father* (Dublin: Veritas, 2017). Peter Mcverry, *The God of Mercy, The God of Gospels* (Dublin: Veritas, 2016). On mercy, there is the text of the spiritual retreat given by Pope Francis in 2016 in Jorge Mario Bergoglio, Pape François, *Retraite spirituelle: Méditations, le visage de la miséricorde* (Vaticana: Parole et silence, 2017). Archbishop Donald Bolen, “Mercy,” in Joshua J. McElwee and Cindy Wooden, eds., *A Pope Francis Lexicon* (Collegeville: Liturgical Press, 2018), 126-34.

<sup>771</sup> Walter Kasper, *Pope Francis’ Revolution of tenderness and Love: Theological and Pastoral Perspectives* (Trans. William Madges; New York: Paulist Press, 2015), 13.

integral ecology and a connection between creation and the poor.<sup>772</sup> This is how he clearly captures this:

A sense of deep communion with the rest of nature cannot be real if our hearts lack tenderness, compassion and concern for our fellow human beings. It is clearly inconsistent to combat trafficking in endangered species while remaining completely indifferent to human trafficking, unconcerned about the poor, or undertaking to destroy another human being deemed unwanted. This compromises the very meaning of our struggle for the sake of the environment. It is no coincidence that, in the canticle in which Saint Francis praises God for his creatures, he goes on to say: “Praised be you my Lord, through those who give pardon for your love”. Everything is connected. Concern for the environment thus needs to be joined to a sincere love for our fellow human beings and an unwavering commitment to resolving the problems of society (LS 91).

AL was presented by Pope Francis as the expression of the merciful love of God *par excellence*. It is an exceptional and unique document insofar as it was published during the jubilee year of Mercy. According to Francis

This Exhortation is especially timely in this Jubilee Year of Mercy. First, because it represents an invitation to Christian families to value the gifts of marriage and the family, and to persevere in a love strengthened by the virtues of generosity, commitment, fidelity and patience. Second, because it seeks to encourage everyone to be a sign of mercy and closeness wherever family life remains imperfect or lacks peace and joy (AL 5).

This pastoral language marked by words of encouragement and mercy appears in AL in terms of mercy and discernment. It was issued during the year of Mercy, Francis used AL as a providential tool to proclaim the mercy of God:

It is providential that these reflections take place in the context of a Holy Year devoted to mercy, because also in the variety of situations affecting families “the Church is commissioned to proclaim the mercy of God, the beating heart of the Gospel, which in its own way must penetrate the mind and heart of every person. The Bride of Christ must pattern her behaviour after the Son of God who goes out to everyone without exception” (AL 309).

For Francis, pastors should share mercy with those in need especially those who are the most broken because mercy is the working of God and it is a criterion to examine if we are true children of God. If mercy has been shown to us, it means that we are called to show mercy to others (AL 310) Finally, “mercy does not exclude justice and truth, but

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<sup>772</sup> Also see Dominique Lang, *Petit manuel d'écologie intégrale : Avec l'encyclique Laudato Si un Printemps pour le monde* (Paris : Saint-Léger, 2015).

first and foremost (...) mercy is the fullness of justice and the most radiant manifestation of God's truth" (AL 311).

It is evident from our exploration, so far, that the language used both by Sobrino and Francis to describe the reality of the poor/vulnerable have connecting and disconnecting points.

#### **6.4 DIFFERENCES AND SIMILARITIES IN THE LANGUAGE OF SOBRINO AND FRANCIS**

This section will proceed by presenting the similarities and then the differences in Sobrino and Pope Francis' language about the poor/vulnerable.

##### **6.4.1 Similarities in Sobrino and Francis' language**

This research identified four points of similarities between Sobrino and Francis: firstly, Both Sobrino and Pope Francis are Jesuits and are inspired by the Ignatian spirituality particularly the theology of Incarnation from the *Spiritual Exercises*, which is considered as a *modus procedendi* or '*une manière de procéder*'. Sobrino and Francis participated at the 32<sup>d</sup> General Congregation of the Jesuits under the General Superior the Spanish Pedro Arrupe between 1974-75. Father Bergoglio attended the meeting as Provincial Superior of the Jesuits in Argentina. It is during this meeting that the Jesuits renewed their commitment for social justice after Vatican II.

For example, looking at the closeness of Francis' vision about the understanding and the concreteness of mercy to that of Sobrino, one wonders if Francis had read Sobrino's writings on mercy before or was it just the influence of the theology of Incarnation from the *Spiritual Exercises* (hereafter SE). Francis expresses this concreteness as follows:

We incarnate the duty of hearing the cry of the poor when we are deeply moved by the suffering of others. Let us listen to what God's word teaches us about mercy and allow that word to resound in the life of the Church. The Gospel tells us: "Blessed are the merciful, because they shall obtain mercy" (Mt 5:7). The apostle James teaches that our mercy to others will vindicate us on the day of God's judgment: "So speak and so act as those who are to be judged under the law of liberty. For judgment is without mercy to one



who has shown no mercy, yet mercy triumphs over judgment” (Jas 2:12-13); (EG 193)

Besides, the similarities between Sobrino and Francis’ language about the poor could be seen through the lens of the theology of Incarnation rooted in the SE. For Rourke,

One of the most significant theological elements in the thought of Jorge Mario Bergoglio is his ongoing reflection on and pastoral implementation of the theology of the Incarnation (...) Saint Ignatius emphasised that the only valid spirituality was through the sacred humanity of Christ. The Jesuit had to contemplate this humanity in the Gospel and enter into it in practice.<sup>773</sup>

For example, in the *Spiritual exercises*, during the second week, a retreatant is invited to contemplate firstly the Mystery of the Trinity (SE101,1). He should not end his contemplation only in prayer, he should also look at the reality in the world (SE 108, 1).

Lavinia Byrne summarizes the double dimension of the SE as follows:

The Exercises are framed by two keys (...) The first Principle and Foundation upon which Ignatius bases his entire ‘method of proceeding’ is given in SE 23. Here he reminds us that we were created ‘to praise, reverence and serve God our Lord.’ Here he reminds us that ‘our desire and choice should be what is more conducive to the end for which we are created.’ Ignatius is a man of desire; his Exercises enable us to know our own desires and follow Jesus the Liberator of our desires. How are we to do this? The text which closes the retreat experience, the Contemplation to Attain the Love of God, invites the retreatant to take its insights out into a world newly conceived.”<sup>774</sup>

Commenting on this double movement in Pope Francis’ thinking, Matthew Ashley will call Pope Francis an “interpreter” of Ignatius’ *Spiritual Exercises*. For him, the way Francis frames the relationship between mercy and justice, ‘the doctrinal’ and ‘the pastoral’ “requires attention to his experience and interpretation of Ignatius of Loyola’s *Spiritual Exercises*.”<sup>775</sup> Philip McCosker asserts:

For Francis’ theology it is important that the Trinitarian dynamic of mercy which the Son manifests as Christ, spills over into our relations with each other. Indeed, he writes daringly that ‘our brothers and sisters are the

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<sup>773</sup> Rourke, 16-7. About the Incarnation dynamic of Jesuit spirituality, see the study of Janos Lucas, “The Incarnation Dynamic of the Constitutions” in *Studies in The Spirituality of Jesuits*, 36/4 (Winter 2004), 11-38. Also see J.B. Libanio, “God’s Project and its Incarnation in History” in *Review of Ignatian Spirituality*, XXXVIII, 2/ 2007, 37-39.

<sup>774</sup> Lavinia Byrne, “The *Spiritual Exercises*: A process and a Text” in *The Way of Ignatius Loyola: Contemporary Approaches to the Spiritual Exercises* (London: SPCK, 1991), 26.

<sup>775</sup> Matthew Ashley, “Pope Francis as Interpreter of Ignatius’s *Spiritual Exercises*” in *Spiritus*, 17 (2017), 176.

prolongation of the incarnation for each of us' (EG 179) (...) This overflow or extension of the incarnation in our fellow humans is the key link between Francis' Christology and the ethic of EG: each implicates the other. This is not simply a matter of implementing Jesus' message and following his commandments, but rather of continuing the Trinitarian mission of love that Jesus Christ incarnated.<sup>776</sup>

This incarnational dimension of the SE also describes a *modus procedendi* inherent to the SE. From this perspective, it is important to highlight that the way Sobrino and Francis express their views are intimately connected to their way of proceeding or methods because it is the summary of the principle and the foundation of *Spiritual Exercises* (SE 23). This close relationship between the way of thinking and way of proceeding was demonstrated by the German theologian Christoph Theobald who considers the Ignatian way of making theology as "théologie comme discernement de la vie authentique."<sup>777</sup>

Secondly, both Francis and Sobrino use Scripture as a source of their theology. The proclamation of the Gospel of the reign of God is central in Sobrino's and Francis' theological thought. For Sobrino for example,

In the gospel terms, the structure of Jesus' life is a structure of incarnation, of becoming real flesh in real history. And Jesus's life is structured in function of the fulfilment of mission—the mission of proclaiming the good news of the Reign of God, inaugurating that Reign through all signs of every sort, and denouncing the fearsome reality of the anti-Reign.<sup>778</sup>

Sobrino also quotes Lk 4:18; 7:22 and Mt 11:5. In the first passage, Jesus is sent first to the Poor. It is to them that the Kingdom of God is announced first. For Sobrino, the relationship between the Kingdom of God and the Poor is established in the Gospels. Therefore, the Poor are the preferred ones in this relationship. In other words, the Poor are the first recipients of the Kingdom.<sup>779</sup> Sobrino mentions other passages from the synoptics to describe the Poor as found in the previous quotation. For example, in Lk

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<sup>776</sup> Philip McCosker, "From the Joy of the Gospel to the Joy of Christ," in *Ecclesiology*, 12 (2016), 36-37.

<sup>777</sup> Theobald, *Le Christianisme comme Style*, 415.

<sup>778</sup> Sobrino, *The Principle of Mercy*, 15.

<sup>779</sup> Sobrino, *Jésus-Christ Libérateur*, 161.

6:20-21, the Poor are those who are hungry, thirsty, the prisoners and those who weep. The Poor are also the despised and marginalized of the society (Mk 2:16; Mt 11:19; 21:32; Lk 15:1) Sobrino also refers to the parable of the Good Samaritan (Lk 10:25-37) to illustrate the nature of the principle of mercy.<sup>780</sup>

Francis also emphasises the relationship between the reign of God, which is expressed in Jesus' Incarnation and the mission of the Church. For him, "True faith in the incarnate Son of God is inseparable from self-giving, from membership in the community, from service, from reconciliation with others. The Son of God, by becoming flesh, summoned us to the revolution of tenderness." (EG 88). Philip McCosker comments on it when reflecting on the Christology of EG that for Francis "the Gospel message, which brings joy is Jesus Christ". Moreover, this Gospel is not an idea or a programme of action but rather a person: "For Francis, Jesus reveals the infinite mercy and love of the Father: by his death and resurrection [Jesus Christ] reveals and communicates to us the Father's infinite mercy (EG 164)."<sup>781</sup> This is what Christoph Theobald calls in other terms the Gospel of the Reign of God "L'Évangile du Règne de Dieu."<sup>782</sup> There should be a relationship between the proclamation of the Gospel and the social life. So, there is an interconnection between the Word of God and Evangelisation because the Church should always let herself be evangelized. For Francis,

All evangelization is based on that word, listened to, meditated upon, lived, celebrated and witnessed to. The sacred Scriptures are the very source of evangelization. Consequently, we need to be constantly trained in hearing the word. The Church does not evangelize unless she constantly lets herself be evangelized. It is indispensable that the word of God "be ever more fully at the heart of every ecclesial activity". [135] God's word, listened to and celebrated, above all in the Eucharist, nourishes and inwardly strengthens Christians, enabling them to offer an authentic witness to the Gospel in daily life (EG 174).

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<sup>780</sup> Ibid.

<sup>781</sup> Philip Mc Cosker, "From the Joy of the Gospel to the Joy of Christ: Situating and Expanding the Christology of *Evangelii Gaudium*," in *Ecclesiology*, 12 (2016), 35.

<sup>782</sup> Theobald, "L'Enseignement Social de l'Eglise selon François," 274.

The interconnection between Scripture and Evangelisation was also mentioned when this research studied the pastoral and the spiritual language of Francis and EG 180 was also quoted. Talking about hearing the cry of the poor, Pope Francis also refers to the example of God in the Scriptures: “A mere glance at the Scriptures is enough to make us see how our gracious Father wants to hear the cry of the poor: “I have observed the misery of my people who are in Egypt; I have heard their cry on account of their taskmasters. Indeed, I know their sufferings, and I have come down to deliver them... so I will send you...” (Ex 3:7-8, 10).” (EG 187) This passage is considered by Liberation theology as essential to understanding God’s preference for the poor.<sup>783</sup> When talking about mercy, Francis refers many times to the parable of the woman Samaritan (Jn 4, 1-30); (EG 72, 120; AL 29, 52, 218, 224). Francis’ episcopal motto is inspired by the phrase from a homily by St. Bede the venerable who was a Christian writer and doctor of the church of the eighth-century. St Bede, commenting on the call of Matthew (Mt 9:9-13) asserts in latin “Miserando atque eligendo” which can be translated thus “because he saw him through the eyes of mercy and chose him.”<sup>784</sup>

Thirdly, Sobrino like Francis uses the language of mercy. For example, Sobrino’s book entitled *El Principio-Misericordia* shows the interconnection between mercy and the concrete situation. In AL Francis states: “mercy does not exclude justice and truth, but first and foremost (...) mercy is the fullness of justice and the most radiant manifestation of God’s truth” (AL 311). It could even say here in metaphorical terms that Sobrino is the prophet who predicted Pope Francis’ Church of mercy. A Church that is

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<sup>783</sup> Jorge Pixley and Clodovis Boff, eds., *The Bible, the Church and the Poor: Biblical, Theological and Pastoral Aspects of the option for the poor* (Trans. Paul Burns. Sao Paulo : CESEP, 1987), 17.

<sup>784</sup> Pascal Nègre, “ “Il les aime jusqu’à l’extrême.” Primauté et miséricorde : convertir la papauté” in *Nouvelle Revue Théologique*, 139 (2017), 375. For him, “la devise du pape François “Miserando atque eligendo” saisit avec précision étonnante le sens du ministère pétrinien qui lui a été donné en partage et dont l’Ecriture rend compte : à l’origine et au cœur de la vocation de Pierre, comme un fondement de sa primauté, il y a l’expérience et la source de la miséricorde.”

informed by mercy, ‘De-Centred by Mercy’<sup>785</sup>, is a Church that should go to the periphery.<sup>786</sup> Let us listen to Sobrino’s message a few years ago in 1992:

The church should reread the parable of the good Samaritan and listen to it with the same rapt attention, and the same fear and trembling, with which Jesus’ hearers first heard it. (...) the place of the church is in the world—in a reality logically external to it (...) the place where human suffering occurs, the place where the cries of human beings resound. The place of the church is with the wounded one lying in the ditch along the roadside, whether or not this victim is to be found physically and geographically within intraecclesial space.<sup>787</sup>

Twenty-one years later in 2013, Pope Francis echoes in incredibly similar words:

Let us go forth, then, let us go forth to offer everyone the life of Jesus Christ. Here I repeat for the entire Church what I have often said to the priests and laity of Buenos Aires: I prefer a Church which is bruised, hurting and dirty because it has been out on the streets, rather than a Church which is unhealthy from being confined and from clinging to its own security. I do not want a Church concerned with being at the centre and which then ends by being caught up in a web of obsessions and procedures (EG 49).

Francis and Sobrino agree that mercy is essential for the church's commitment to the vulnerable. Talking about mercy, Sobrino invites us to be honest with the reality, for example, the honest denunciation of injustice and to hope that this denunciation cannot be silenced. This hope “is part of concrete reality (...) especially when so many other concrete historical experiences counsel scepticism, cynicism, or resignation.”<sup>788</sup> Sobrino defines mercy beyond the affective movement because it should prompt for action to change the unjust situation.<sup>789</sup>

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<sup>785</sup>The Jesuit Salai remarks that this word is from the *Spiritual Exercises*. Referring to the S.E. in his book about the Jesuits who shaped Pope Francis, he asserts: “To pray (...) is fundamentally “de-centring,” as it requires us to step aside and let Jesus Christ take front stage, inviting him to steer the boat of our lives. Pope Francis remains free to be himself, loving God and others as himself, precisely because Jesus (and no one else) occupies the centre of his attention.” (Sean Salai, *All the Pope’s Saints: The Jesuits who shaped Pope Francis* (Indiana: Our Sunday Visitor, 2016), 157.)

<sup>786</sup>On this, there is an interview of the French Bishop Michel Dubost where he explains in a practical way what it means to go to the periphery. (Michel Dubost, “Sortie aux périphéries” in *Le Grand tournant : L’an I de la Révolution du pape François* (Paris : Cerf, 2014), 49-72. About the meaning of Francis’ understanding of the word ‘periphery’ one can also consult the Jesuit Review *Christus* on “Décentrés pour aimer vers les périphéries,” No 259, Juillet 2018.

<sup>787</sup>Sobrino, *The Principle of Mercy*, 20-21.

<sup>788</sup>Sobrino, “Spirituality and the following of Jesus,” 684.

<sup>789</sup>Ibid., 682. Also see, Michael O’Sullivan, “The Jesuit Spirituality of Pope Francis,” in *Spirituality*, 20 (September-October 2014), 295-300

Fourthly, Sobrino and Francis' method are contextual. Sobrino's theological method is Christo-praxis, it is contextual.<sup>790</sup> Sobrino's method is built on the historical Jesus, who is known within the community of faith, and in the history of the crucified people.<sup>791</sup> The Jesuit theologian Georges de Schrijver calls Sobrino's approach "Christology from the underside of history".<sup>792</sup> Sobrino's method is based on the reality of the poor and the oppressed of El Salvador and Latin America in General. For Moeahabo P. Moila,

Sobrino's Christological methodology places much emphasis on the partiality of Jesus for the poor. The method starts from the lowly and aims at turning people into the children of God. As such for him the praxis of Jesus saves, and discipleship always means following Jesus. Jesus for him sides with the poor and the oppressed. For him, therefore, following on the historical Jesus is the precondition for reaching Jesus. Sobrino suggests a Christian lifestyle which commits itself to historical tasks, social militancy, the "praxis" of liberation.<sup>793</sup>

Like Sobrino, Francis' theological method is also contextual and rooted in the Christian Action Movement of See-Judge-Act inspired by the Belgian Cardinal Cardijn and developed by the Episcopal Commission of Pastoral Care (COPAL) in Argentina. This method, which is very pastoral, is also found in the Aparecida Document attributed

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<sup>790</sup> For Stephen Bevans, the contextual theology is "a way of doing theology in which one takes into account: the spirit and message of the gospel; the tradition of the Christian people; the culture in which one is theologizing; and social change in that culture." It is an "attempt to understand Christian faith in terms of a particular context." "what makes contextual theology precisely contextual is the recognition of the validity of another *locus theologicus*: present human experience." (Stephen B. Bevans, *Models of Contextual Theology: Faith and Culture* (Maryknoll, NY: Orbis, 1992), 1-2.)

<sup>791</sup> Jon Sobrino, *Christology at the Crossroads: A Latin American Approach*. (Translated by John Drury. New York: Orbis Books, 1978), 238.

<sup>792</sup> Georges de Schrijver, "Christology from the Underside of History: the case of Jon Sobrino" in *The Myriad Christ: Plurality and the Quest for Unity in Contemporary Christology* (Leuven: Leuven University Press, 2000), 493.)

<sup>793</sup> Dr. Moeahabo P. Moila, "The role of Christ in Jon Sobrino's liberation theology: its significance for black theology in south Africa," available at [http://disa.ukzn.ac.za/sites/default/files/pdf\\_files/BtMay89.1015.2296.003.001.May1989.5.pdf](http://disa.ukzn.ac.za/sites/default/files/pdf_files/BtMay89.1015.2296.003.001.May1989.5.pdf) (accessed 29/10/2017) Amy L. Chilton Thompson confirms this understanding of Sobrino's Christo-Praxis when she states: "Sobrino re-forms Christological method so as to place the contextualised following of the historical Jesus as the first state of Christology. Sobrino's Christological method depends upon the whole of the historical Jesus; he simultaneously insists that this Jesus is known only by following him from within the community of faith. Only out of this faith encounter can the second stage of theology arise—that of doctrinal/theological statements." (Amy L. Chilton Thompson, "Unsettling Conversations: Jon Sobrino's Christo-Praxis as a Baptist Theological Method?" in *Perspectives in Religious Studies*, Vol. 40 (Spring 2013), 237.

to Cardinal Bergoglio. This is an inductive methodology, which begins with “an analysis of the reality, getting in touch with the concrete situation of one’s people.”<sup>794</sup> Gerard Whelan refers to EG as contextual theology saying that “the magisterial document most quoted in EG is that of Aparecida and a comparison of the two documents reveals three striking parallels: it adopts a method of “See,” “Judge,” and “Act.””<sup>795</sup> To sum up, Sobrino’s and Francis’ methods are both contextual. Even though they are also different.

#### **6.4.2 Differences in Sobrino and Francis’ language**

Firstly, Sobrino and Francis’ methods are contextual but inspired by two different contexts and two different theological schools. For example, Sobrino’s Christo-praxis method is linked to the theology of liberation, which, at once, emphasizes the privileged reality at the same time as the class struggle. It should also be pointed out here that this link between his theology and the Marxist method remains purely intellectual and has nothing to do with his Jesuit intuition moved by the inhuman situation of the oppressed in Latin America and the world.<sup>796</sup> Concerning Pope Francis, his method is theologically related to the theological school of Argentina known as theology of the people, which puts a stress on the life of the people and especially the culture of the people. It is arguable

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<sup>794</sup> Deck, *Ibid.*, 35. Also see Jean-Luc Brunin, “La pensée sociale du Pape François” in *La pensée sociale du Pape François* (Namur (Belgique): Jesuites, 2016), 52-54.

<sup>795</sup> Gerard Whelan, “Evangelii Gaudium as “Contextual Theology”: Helping the Church “Mount to the Level of its Times” in *Australian eJournal of Theology*, 22.1 (April 2015), 6.

<sup>796</sup> Robert Lassalle-Klein also situates Sobrino’s method in the framework of contextual theology and he uses the term ‘saving history’ from Karl Rahner to describe Sobrino’s Christology. In fact, Karl Rahner distinguishes two basic types of Christology: “the first type the ‘saving history’ type, a Christology viewed from below, and the second type, the metaphysical type, a Christology developing downwards from above.” (Karl Rahner, *Theological Investigations: Theology, Anthropology, Christology*, Vol. XIII (Trans. David Bourke; London: Darton, Longman & Todd, 1975), 213-214; Also see Robert Lassalle-Klein, “Jesus of Galilee and the Crucified People: The Contextual Christology of Jon Sobrino and Ignatio Ellacuriá” in *Theological Studies*, 70 (2009), 356.) For Lassalle-Klein, Sobrino’s Christological method should be understood in relationship to the ‘saving Christology’. Rahner asserts: “we must now proceed to delineate the first type, the ‘saving history’ Christology. In it the eye of the believer in his experience of saving history alights first on the man Jesus of Nazareth, and on him in his fully human reality, in his death, in the absolute powerless and in the abidingly definitive state which his reality and his fate have been brought to by God, something which we call his Resurrection, his glorification, his sitting at the right hand of the Father. The eye of faith rests upon this man Jesus.” (Rahner, 215) Referring to this quotation, Lassalle-Klein concludes that “Sobrino explicitly ties his Christology to this “understanding of Karl Rahner...to restore to Christ his true humanity.” (Ibid, 357).

that Pope Francis' theology is an ongoing theology while the theology of Sobrino is well known as a Liberation theology.

The second difference is in the understanding of the concept of poor. Sobrino's understanding of the poor places the emphasis on the economically poor and oppressed while Francis understands the concept in an integral way and that is why in this research when speaking about Francis I use the term vulnerable because it is inclusive of all categories of human suffering. Francis' understanding of the concept "poor" integrates new forms of human suffering in relation to the whole creation such as "the elderly homeless," "the vulnerable families" EG 212, "unborn children" "victims of various kinds of human trafficking" EG 211, "all forms of enslavement" EG 57, "a spiritual "desertification"" EG 86, desertification, pollution (LS 158), climate change affects the most vulnerable ( EG 209, LS 48; 64; 66; 134; 186; 196; 198) street children (AL 45), Migration, family breakdown (AL 46).<sup>797</sup>

In today's context, the language used to describe the poor has been enriched and enlarged by Pope Francis. The description of the poor goes beyond material poverty and the oppressed as born in the context of Liberation theology. In my opinion, with Pope Francis' language about the vulnerable, there is a shift in theology concerning the understanding of the expression 'preferential option for the poor'. Pope Francis understands the Church of the poor in an integral way. He goes beyond Sobrino's emphasis on economic poverty. The Church of the poor/vulnerable is much more understood by Francis as a theological category rather than a cultural, sociological, political or philosophical one. The next section will be dedicated to further debate about

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<sup>797</sup> In his letter to the people of God on August 20<sup>th</sup>, 2018, Pope Francis also refers to minors and vulnerable adults as vulnerable people who need protection. (See [http://w2.vatican.va/content/francesco/en/letters/2018/documents/papa-francesco\\_20180820\\_lettera-popolo-didio.html](http://w2.vatican.va/content/francesco/en/letters/2018/documents/papa-francesco_20180820_lettera-popolo-didio.html) (Accessed 21/08/ 2018))



the possibility of replacing the expression ‘option for the poor’ or ‘preferential option for the poor’ in theology today.

### **6.5 JOURNEY FROM THE ‘OPTION FOR THE POOR’ TO THE ‘COMPASSION’ FOR THE VULNERABLE**

There are at least two reasons that motivated this research to consider a journey from the use of the expression “option for the poor” to an inclusive theological expression in today’s context: First, the expression “option for the poor” was born in a specific context, Latin America, which was marked at that time by the regimes of oppression and especially material poverty. Even though the term “option for the poor” or “preferential option for the poor” has been enriched over time not only in the Social Teaching of the Church but also at the theological level, the expression is still questioned and under debate today. Moreover, Pope Francis highlights the situation of the vulnerable today in relationship to free market and consumerist society.

Secondly, it is very difficult if not impossible to define the terms ‘option’, ‘preferential’ and even the ‘poor’ today. There are also new forms of suffering that liberation theologians acknowledge today as a challenge to their theology.<sup>798</sup> These new categories of vulnerable people have appeared in Latin America such as the social and historical conditions of the Amerindians, and African-descendants, female poverty and new identity such as LGBT. All this constitutes a challenge for liberation theologians.<sup>799</sup> These new paradigms not only oblige liberation theologians to include these new questions in their theology but also theologians in general. Consequently, it

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<sup>798</sup> See the article of Geraldo de Mori where he assesses Liberation theology in the context of religious and cultural pluralism. For example, he mentions that there are new forms of suffering highlighted by some liberation theologians as challenges to the theological current such as: female poverty, presence in Latin America of the so-called minorities: gay, lesbians, bisexual, transsexual and the question of ecology. Their presence in Latin America raises new theological questions and challenges for the Church of Latin America. (Geraldo de Mori, “La théologie de la libération à l’heure du pluralisme culturel et religieux” in *Etudes*, no 4205 (Mai 2014),61-71. De Mori states : “la pauvreté acquiert in chaque époque de nouveau visage, « qui donne à penser » et appelle à l’action” (Ibid., 71)

<sup>799</sup> Geraldo de Mori, “Une théologie à l’école des pauvres : les Nouvelles frontières de la théologie de la libération” in *Revue Théologique de Louvain* 46, 3 (juillet septembre 2015), 395.

makes obsolete the expression ‘option for the poor’ born in Latin America, enriched in the Social Teaching of the Church with the term ‘preferential’.

In today’s theological debate for example, the theologian and activist Joerg Rieger speaks about “options for the people at the margins”.<sup>800</sup> For Rieger the margins are those who are sucked into the free flow of differences and free market. His understanding of the vulnerable in relation to free market is like Pope Francis’ interpretation especially when the pontiff criticises the consumerist society. Pope Francis understood that talking about the vulnerable cannot be done today without referring to this free market. That is the reason for his famous statement “Such an economy kills.” (EG 53)<sup>801</sup>

For Rieger (and I can also add for Pope Francis), today’s context of free market or ‘consumerist society’ does not talk anymore about the relationship between the oppressor and oppressed but it focuses on the free flow of differences.<sup>802</sup> In this context, almost everything is reshaped by virtual realities of all sorts. Rieger declares that all these changes, which are reshaped by virtual realities have influence on the vulnerable people who do not have access to virtual reality: “Even the lives of the vast groups of people who do not have immediate access to virtual reality are affected by it because they can be safely bypassed (or organized for business interests without ability to resist) due to their lack of access.”<sup>803</sup> Andrea Torielli and Giacomo Galeazi note that in 2014, the

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<sup>800</sup>Rieger, ed., *Opting for the Margins*, 1.

<sup>801</sup> From this statement Andrea Torielli and Giacomo Galeazi wrote a book where they highlighted Francis’ opposition to the imperialism of money, the globalisation of indifference, the place of the poor in the free market society and the protection of creation. (Andrea Torielli and Giacomo Galeazi, *This Economy kills: Pope Francis on Capitalism and Social Justice*, (trans. Demetrio S. Yocum; Minnesota: Saint Benedict, 2015), 31.)

<sup>802</sup> Rieger, ed., *Opting for the Margins*, 14. In a constructive, and critical theological reflection, Rieger suggests an alternative to the conception of the God of prosperity in the US. God is the divine Other who enters in our predicaments and shares in it. (Joerg Rieger, *No Rising Tide: Theology, Economics, and the Future* (Minneapolis: Fortress, 2009), 162. There is comprehensive literature from the same author in relation to this theme: Id., *Religion, Theology and Class: Fresh Engagements after Long Silence* (New York: Palgrave MacMillan, 2013); Id., *God and the Excluded: Visions and Blind Spots in Contemporary Theology* (Minneapolis: Fortress, 2001); Id., *Globalization and Theology* (Nashville: Abingdon, 2010); Id., ed., *Across Borders: Latin Perspectives in the Americas Reshaping Religion, Theology and Life* (Maryland: Lexington, 2013).

<sup>803</sup>Rieger, ed., *Opting for the Margins*, 5.

expression ‘children of the recession’ appeared in the UNICEF report in the following terms: “it attests (UNICEF report) to the existence of more than 76 million children who live in poverty in rich countries and an increase shown in 23 of the 41 countries of the Organisation for Economic Co-operation and Development (OECD).”<sup>804</sup>

This is attested by another phenomenon in today’s free market society; For example, Rieger highlights a wide gap between the time of the American industrialist Henry Ford (1863-1947), the founder of the Ford Motor Company and today’s free market society. At the time of Henry Ford, the power of the workers was essential for economic progress. Consequently, the workers deserved a certain minimum of attention and care: “today, as capital is becoming more and more independent of labour, workers are becoming more and more vulnerable. Since they are not as flexible and movable as money, they are left behind whenever money is transferred from one labour market to another.”<sup>805</sup>

Another Brazilian Jesuit and theologian Geraldo De Mori remarks that today’s context is characterised by “la subjectivité vulnérable” or vulnerable subjectivity and the change of epoch and post modernity especially in Latin America.<sup>806</sup> He borrows the expression ‘vulnerable subjectivity’ from the Mexican theologian Carlos Mendoza, which highlights the new challenges facing the theology of liberation today. His reflection starts from the invisible faces and identities of society, history and even the Church. There are African-descendants and Indian-descendants who suffered and were ignored in Latin America. For example, in Brazil there is an attempt to remember the past and the fight against racism and the inclusion of the African-descendants in society.<sup>807</sup>

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<sup>804</sup> Andrea Torielli and Giacomo Galeazi, *This Economy kills*, 70.

<sup>805</sup> Rieger, 7-8.

<sup>806</sup> Geraldo de Mori, “Une théologie à l’école des pauvres : les Nouvelles frontières de la théologie de la libération” in *Revue Théologique de Louvain* 46, 3 (juillet septembre 2015), 395.

<sup>807</sup> *Ibid.*, 376.

Meanwhile there is a denunciation of violence against women in Latin American society and a kind of integration of the gender theory from North America. For Geraldo De Mori, Liberation theology is facing new challenges, which he entitles “La théologie de la Libération face au pluralisme.”<sup>808</sup> De Mori suggests rereading theologically the present, which implies acknowledging that the biblical meaning of the concept “poor” as understood by Liberation theology excluded many people from Latin American Society. For him, Liberation theologians were inspired by the ethical reading of the poor based on the triad widow-orphan-stranger of the prophets of the North of Israel.<sup>809</sup>

In the light of all this, it seems reasonably clear that the expression “preferential option for the poor” is challenged by the new paradigms of the free market society. Besides, the expression “option for the poor” itself was born in a particular context and was related to the situation of the poor and oppressed of Latin America. So, with the appearance of new forms of human suffering and new categories of vulnerability today, should theologians continue to use the expression “preferential option for the poor?” Could the expression ‘compassion for the vulnerable’ be used instead? The concept ‘compassion for the vulnerable instead of ‘preferential option for the poor’ might do justice to those who oppose the latter by considering that it is in opposition to the universal principle of love of God for all, poor and rich alike.<sup>810</sup>

In addition, the use of ‘the language of the vulnerable’ today can also be interpreted in the light of *Gaudium et Spes on the Church in the Modern World*:

In every age, the church carries the responsibility of reading the signs of the times and of interpreting them in the light of the Gospel, if it is to carry out its task. In language intelligible to every generation, it

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<sup>808</sup>Geraldo de Mori, “La théologie de la libération a l’heure du pluralisme culturel et religieux” in *Etudes*, no 4205 (Mai 2014),67)

<sup>809</sup> De Mori, “Une théologie à l’école des pauvres,” 396.

<sup>810</sup> For the debate on this expression, there are significant writings such as: Stephan Pope, “Proper and Improper Partiality and The Preferential Option for the Poor,” in *Theological Studies*, 54 (1993), 242-71. Daniel G. Groody and Gustavo Gutierrez, eds., *The Preferential Option for the Poor beyond Theology* (Indiana: Notre Dame, 2014), 2

should be able to answer the ever-recurring questions which people ask about the meaning of this present life and of the life to come, and how one is related to the other. We must be aware of and understand the aspirations, the yearnings, and the often-dramatic features of the world in which we live (GS 4).

In the same way that ‘the language of liberation theology’ is grounded on the answers given by Liberation Theology to the aspirations of the people of Latin America in the 1960s and 1970s, also ‘the language of the vulnerable’ is intelligible for today’s world for various reasons: Firstly, this study has shown that ‘the language of liberation theology’ (represented in this research by Jon Sobrino) is incomplete today in its theological roots and contents. Secondly, ‘the language of the vulnerable’ (represented in this research by Pope Francis) is an inclusive and integrating language. Thirdly, ‘the language of the vulnerable’ links into a universal appeal today. Henk Ten Have states that

the scholarly literature shows that the notion (vulnerability) has increasingly been applied beyond its traditional medical and military scope. It is used in a wide variety of research contexts such as public health, ecology, disasters, poverty, development, climate change, and security. (...) new types of vulnerability have been distinguished: psychological, social, economic, environmental, and even existential and cultural. Recent discourses on vulnerability emphasize the global dimension<sup>811</sup>

There is also a growing awareness about the place of vulnerable people in the pastoral ministry today. As an assistant priest in a parish in Dublin, I must be vetted, and I should follow regularly training on the safeguarding and protection of children and vulnerable adults. These reasons show how ‘the language of the vulnerable’ goes beyond the theological domain today and becomes a universal appeal.

That is why this study suggests replacing the expression ‘preferential option for the poor’ by ‘compassion for the vulnerable’ for a couple of theological reasons: Firstly, the expression ‘compassion for the vulnerable’ instead of ‘preferential option for the

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<sup>811</sup> Henk Ten Have, *Vulnerability: Challenging bioethics* (London: Routledge, 2016), 23.

poor’ might do justice to those who oppose the latter by considering that the ‘preferential option for the poor’ is in opposition to the universal principle of love of God for all, the poor and the rich alike. Secondly, even though compassion<sup>812</sup> is to suffer with someone, to share with the suffering of others, Sobrino like Francis always relates it to the concrete situation because mercy is more than affective movement of the emotions. The last act of mercy or compassion is reaction in the face of the suffering of one another.<sup>813</sup>

To act with mercy is to learn from the parable of the last Judgment Mt 25:35-36: “for I was hungry and you gave me food, I was thirsty and you gave me something to drink, I was a stranger and you welcomed me, I was naked and you gave me clothing, I was sick and you took care of me, I was in prison and you visited me.”<sup>814</sup> In addition, Francis considers mercy as a journey from the heart to the hands: “Misericordia es un viaje del Corazón a los manos.”<sup>815</sup> The compassion of the heart leads to the work of the

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<sup>812</sup> Ibid. For the meaning of compassion, see A.M. Allchin, “compassion” in *The Oxford Companion to Christian Thought* (Oxford: Oxford University Press, 2000), 128. For A. M. Allchin, the word is “rooted in a belief in the human ability to suffer with another’s suffering.” Finally, compassion is understood from the perspective of the compassionate love of God in Christ. In another article H. H. Esser analyses the concept Mercy or compassion in three different Greek words: *eleos* which refers to the feeling of pity, *oiktirmos* which refers to the exclamation of pity or regretting a person’s misfortune and *splanchna* which he explains as the seat of emotions or heart. In the synoptic Gospels, the first word *eleos* when it is a verb *eleeō*, “marks that breaking in of the divine mercy into the reality of human misery which took place in the person of Jesus of Nazareth with his work of freeing and healing which demonstrated his authority. Jesus answered the cry for help “have mercy on me” (Mk. 10:47, 48 par. Mt 9:27; 15:22; 17:15; Lk. 17:13)” (H. H. Esser, “Mercy” in *New Testament Theology*, Vol. 2, 595). Esser underlines that the verb from *oiktirmos* is found in Rom. 9:15 and it is in parallel to the verb *eleeō*. (Ibid., 598). Paul J. Wadell also analyses the word compassion in the pastoral-liturgical tradition. He asserts: “Compassion is the capacity to be moved by another’s misfortune and to feel sorrow for it because we see it as our own (...) compassion leads, where possible, to acts of care on behalf of those who suffer (...) In this respect, compassion is an integral part of the distinctive Christian love of agape, (...) compassion entailed by charity, the friendship love we have for God, even our enemies.” (Paul J. Wadell, “Compassion” in *The Collegeville Pastoral Dictionary of Biblical Theology* (ed. Carrol StuhlmueLLer; Collegeville, Minnesota: The Liturgical Press, 1996, 158.) For A.M. Allchin, the theme compassion “is also to be found in other religious Traditions, most notably in the case of Buddhism, where the thought that universal compassion is a characteristic of the Buddha-nature is found in many different schools, from Tibetan Buddhism to Japanese Zen. In Islam, faith in God as the merciful and compassionate one can lead to the idea that the believer is also to mirror these qualities, though here the idea of shared suffering is less prominent.” (A.M. Allchin, “Compassion” in *The Oxford Companion to Christian Thought*, 128.)

<sup>813</sup> Jon Sobrino, “Spirituality and the following of Jesus,” in *Mysterium Liberationis: Fundamental Concepts of Liberation Theology* (trans. Orbis Books; Maryknoll, NY: Orbis, 1993), 682.

<sup>814</sup> These passages are from Amy-Jill Levine and Marc Zvi Brettler, eds, *The Jewish annotated New Testament*, (Second Edition; USA: University Press, 2017).

<sup>815</sup> See the statement is from the Video message of Pope Francis to the Argentine NGO “Manos Arrientas,” available at <https://www.youtube.com/watch?v=sHyd9u0JHow> (accessed 03/03/2018).

hand. Compassion starts in the heart only if we allow the misery of others to enter our heart. From the heart, goes the movement to the hands to help the other, the commitment to the other starts in the heart. It is a double movement. Jon Sobrino and Pope Francis use the parable of the Samaritan to explain Mercy or compassion.<sup>816</sup>

## 6. 6. CONCLUSION

This chapter, which set out to explore the language of the poor/vulnerable used by Sobrino and Francis, was organised in four sections.

In the first section, we noted that Sobrino's language about the poor is borrowed from Liberation theology and unsurprisingly so as he is one of the founding fathers. The exploration of his language of mercy indicated that mercy or compassion is not only an affective sentiment even though it starts from there, but it implies concreteness, being true to reality, to be committed to justice.

In the second section on the language used by Pope Francis to describe the vulnerable, we chose to use the term vulnerable in the sense that the human being is always exposed to fragility of all kinds. The way Pope Francis describes human suffering can be summarized by the concept of vulnerability.<sup>817</sup> Our study identified a triple way of highlighting the vulnerable by Francis: a pastoral and spiritual approach based on accompaniment and the closeness of the Church to the vulnerable. This also inspired one of the titles of this section on Francis' pastoral and spiritual language because Francis'

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<sup>816</sup> Hille Haker also refers to John Baptist Metz's understanding of the concept compassion in the framework of political theology in these terms: "Compassion is neither (merely) empathy nor (paternalistic) pity but entails the recognition of the other—as the concrete other: it correlates with the moral claim that I must see the traces of damage that suffering, and especially suffering from injustice, leaves, and that I must respond to the suffering of others. For Metz this personal dimension of suffering must lead to the practice of solidarity that is the linchpin of his political twist of compassion." (Hille Haker, "Compassion for Justice," in *Concilium*, 4 (2017), 55.

<sup>817</sup> In his first message for the World day of the Poor, the language used by Francis highlights his intention to reach all those who are in need, "all those who stretch out their hands and plead for our help and solidarity." (Pope Francis, "Message of his Holiness Pope Francis First World Day of The Poor," available at [http://w2.vatican.va/content/francesco/en/messages/poveri/documents/papa-francesco\\_20170613\\_messaggio-i-giornatamondiale-poveri-2017.html](http://w2.vatican.va/content/francesco/en/messages/poveri/documents/papa-francesco_20170613_messaggio-i-giornatamondiale-poveri-2017.html) (accessed 25/01/2018).

description of the human fragility does not only shed light on the economically poor but also the new categories of human suffering engendered by the throw away culture or the consumerist society. In addition, the principle of mercy and the Church of mercy are essential in the way of dealing with the vulnerable of our society.

The third section concentrated on the similarities and differences between Sobrino and Francis in their language about the poor/vulnerable. Concerning the similarities, the principle of mercy and the Church of mercy were the common ground between Pope Francis and Sobrino. As Jesuits, both are also influenced by the theology of Incarnation from the SE, which insists on the relationship between the contemplation of Jesus' life in the Gospels and commitment in the world. It also noted that both Sobrino and Francis' methods are contextual.

On the point of difference, we highlighted that Sobrino' theological method is Christo-praxis but inspired by Liberation theology while Francis' method, though inspired by the Theology of the People, is anchored on the Christian Action Movement of See-Judge-Act. In addition, Sobrino's theology could be qualified as Liberation theology while Francis' theology is still an ongoing theology.

The fourth section of this chapter initiated a journey from the 'preferential option for the poor' towards a search for an inclusive theological language to express the commitment of the Church to the vulnerable. This was motivated by the fact that we found it difficult to define the concepts "option", "preferential" and even the concept of "poor" or "poverty" today. In addition, the expression "option for the poor" was born in the 1960s in Latin America in relation to oppression and material poverty even though the Social Teaching of Church with the concept "preferential" has enriched it.

Moreover, new categories of human suffering have appeared in Latin America today. For instance, the marginalization of the Amerindians and the African-Americans



in Latin America have been put in the spotlight, and new forms of identity such as LGBT emerged in the same context. In our exploration, we also discovered that Francis has introduced new categories of human suffering in relation to the whole of creation. It is not surprising that in *Gaudete Exultate*, he equally refers to the life of unborn children and the suffering of those who are already born. He states:

Our defence of the innocent unborn, for example, needs to be clear, firm and passionate, for at stake is the dignity of a human life, which is always sacred and demands love for each person, regardless of his or her stage of development. Equally sacred, however, are the lives of the poor, those already born, the destitute, the abandoned and the underprivileged, the vulnerable infirm and elderly exposed to covert euthanasia, the victims of human trafficking, new forms of slavery, and every form of rejection.[84] We cannot uphold an ideal of holiness that would ignore injustice in a world where some revel, spend with abandon and live only for the latest consumer goods, even as others look on from afar, living their entire lives in abject poverty (GE 101).

These new challenges led this research to question the fitness of the expression “preferential option for the poor” in theology today. Based on Sobrino’s and Francis’ understanding of the principle of mercy in relation to the situation of the vulnerable and considering the universal appeal of the concept of vulnerability today, this research suggests that the expression “compassion for the vulnerable” should be used instead of “preferential option for the poor”.

## **GENERAL CONCLUSION**

Two questions guided this research on the comparative analysis of the language used by both Francis and Sobrino to describe the poor/vulnerable. The starting and guiding question: Is the “preferential option for the poor” experiencing a new springtime today? The study of Sobrino’s and Francis’ description of the poor/vulnerable showed that new forms of human suffering have appeared in today’s world. This dissertation argued that these new forms of human suffering challenge the theological use of the expression ‘preferential option of the poor’ because they were not conceivable at the time of its first use in the 1960s. Consequently, the second question of this research was elicited: Should theologians continue to use the expression ‘preferential option of the poor’ today? This study organized in six chapters has attempted to address these questions.

The first chapter showed that although the preferential option for the poor is rooted in the Bible, its historical and theological meanings are complex and still debatable. The definition of some terms of the expression such as option, preferential and poor have limitations. The development of the expression in the social teaching of the Church, and in the Jesuit tradition revealed that there has been a renewed interest in the expression since the Second Vatican Council. The Society of Jesus, of which Jon Sobrino and Pope Francis are members, dedicated its thirty-second General Congregation to the renewal of the Jesuit commitment to social justice in the world.

As the expression option for the poor was born in a Latin American context marked at that time by the influence of Liberation theology, the expression cannot be fully understood without reference to the material poverty, and political oppression prevalent in the region at that time. This dissertation demonstrated this through a study of Sobrino’s theological understanding of the poor in the second and the third chapter. After more than fifty years, the expression ‘preferential option for the poor’ continues to

be used in various ways, which are very different from the original understanding. Through the study of Francis in the fourth chapter, this dissertation discovered how the understanding of the concept 'poor' and the 'Preferential Option for the Poor' can also be influenced by different contexts. Francis is influenced by some key backgrounds detailed in the fourth chapter and especially by the meeting of CELAM at Aparecida in 2007 where he was the main architect. Even though Francis conveys the views of a long tradition of the Church on the commitment to aid the poor, this dissertation discovered that Francis' criticism of an economy of exclusion is not to everyone's taste. That is why the fifth chapter focused on the critical assessment of his social and theological thought.

The last chapter demonstrated that both Sobrino's and Francis' approaches and their understanding of the preferential option for the poor are rooted in the Ignatian spiritual tradition with an insistence on the theology of Incarnation. However, there are also differences. Sobrino is known as a liberation theologian and his understanding of the poor is intimately related to the theology of liberation. As an Argentinian, Francis' understanding of the expression is influenced by the theology of the people, which puts an emphasis on the culture.

It emerged from our reflections that Sobrino's and Francis' understanding of the poor/vulnerable is linked to their comprehension of the concept of mercy and the Church of mercy. Mercy goes beyond simple affection to commit oneself to changing the situation of others. It implies a spirit of solidarity with the less fortunate. The language of mercy shared by Sobrino and Francis goes beyond the concept of the poor to questioning human suffering in general. For this reason, this dissertation suggests using the term vulnerable instead of the poor. It argues that the concept 'vulnerable' is inclusive of all categories of the poor. When Sobrino describes the poor, he refers mostly to the economically poor and the victims of oppression. Besides, the Church of the poor is a

theological setting in Sobrino's Christology. The place given to the poor in his Christology led to the opposition of the CDF in a notification to Sobrino that this research outlined in chapter three.

Pope Francis describes the concept of the poor in an integral way. For example, he speaks of vulnerable families or the vulnerable. Francis' understanding of the concept "poor" integrates new forms of human suffering in relation to the whole of creation. This dissertation has argued that in today's context, the language used by Francis to describe the poor/vulnerable has been enriched. As Francis' comprehension of the poor goes beyond material poverty and the oppressed, this dissertation argued that with Pope Francis there is a shift in theology concerning the use of the expression 'preferential option for the poor.' It initiates a journey from the use of the expression 'preferential option for the poor' to a search of an inclusive theological expression today. Two main reasons motivated this initiative:

Firstly, the expression "option for the poor" was born in a specific context, Latin America in the 1960s, which was marked at that time by oppressive regimes and material poverty. Even though the term "option for the poor" or "preferential option for the poor" has been enriched over time not only in the social teaching of the Church but also at a theological level, the expression is still questioned and debated today. Moreover, Pope Francis highlights the situation of the vulnerable today in relationship to free market and the consumerist society.

Secondly, this research found that it is very difficult to say today what exactly is meant by the terms: 'option', 'preferential' and even the 'poor'. Reflecting on the "proper and improper partiality and the preferential option for the poor," Stephen Pope acknowledges that the word 'preferential' is the most controversial term in the phrase

“preferential option for the poor.”<sup>818</sup> The term preferential was added to the phrase option for the poor by the Conference of the Bishops of Latin America at Puebla in 1979. Nevertheless, it is still challenging to hold together the universality of God's love and the preference for the poor.<sup>819</sup>

Considering the universal appeal of the language of vulnerable today, this research has argued that this phenomenon should be seen through the lens of the pastoral Constitution *Gaudium et Spes*, which beautifully summarizes it by the expression “scrutinizing the signs of the times” (GS 3-4). The concept of vulnerability implies our common humanity. Besides, Jon Sobrino and Pope Francis have shown that compassion is more than affective emotion because it calls to action. Here Saint James can be quoted to support this understanding of the concept compassion: “If a brother or sister is naked and lacks daily food, and one of you says to them, ‘Go in peace; keep warm and eat your fill,’ and yet you do not supply their bodily needs, what is the good of that?” (James 2:15-16)<sup>820</sup>

Based on these aforementioned reasons, this dissertation has argued that the expression “preferential option for the poor” should be replaced by “compassion for the vulnerable”. It is hoped that this initiative might inspire further study or a debate about the expression ‘preferential option for the poor’ and lead the research to a wider public debate.

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<sup>818</sup> Stephen J. Pope, “proper and improper partiality and the preferential option for the poor,” in *Theological Studies*, 54 (1993), 243.

<sup>819</sup> Gutiérrez, *A Theology of Liberation*, 129.

<sup>820</sup> Amy-Jill Levine and Marc Zvi Brettler, eds, *The Jewish annotated New Testament*, (Second Edition; USA: University Press, 2017).

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