Chapter 3
Christians and Communists

> When I feed the hungry, they call me a saint. When I ask why they have no food, they call me a Communist.
>
> Archbishop Helder Camara

The continued and worsening existence of human poverty is a very special problem in liberation theology, Gustavo Gutiérrez acknowledges, that requires us to find the best way to proclaim the Gospel. In order to accurately understand the situation of poverty, he believes we need to apply social analysis, including the use of some Marxist concepts. Also advocating the use of Marxist categories to enhance Christianity's understanding of social and political realities is José Míguez Bonino, an influential Protestant theologian from Argentina. Bonino holds that Christians confronted by the inhuman conditions of existence in Latin America have tried to make their Christian faith historically relevant through an 'analysis and historical programme'. Since remedial and reformist economic policies have failed, he believes he has discovered 'the unsubstitutable relevance of Marxism'.[1]

This chapter discusses Gustavo Gutiérrez's theology and his use of Marxism, highlighting their points of convergence and divergence. It examines the relationship between Christianity and Marxism and

1. José Míguez Bonino, *Christians and Marxists: The Mutual Challenge to Revolution* (London: Hodder and Stoughton, 1976), 19. In fact, Alistair Kee argues that the liberation project has failed because it is not Marxist enough. Kee argues that Marxism cannot be utilised selectively at the whims of theologians to suit their argument. They have also to accept its criticism of religion itself. See Alistair Kee, *Marx and the Failure of Liberation Theology* (London: SCM, 1990) For a detailed and insightful discussion on the issue of Marxism in liberation theology, see Denys Turner, 'Marxism, liberation theology and the way of negation', in Christopher Rowland, ed., *The Cambridge Companion to Liberation Theology* (Cambridge: Cambridge University Press, 2007), 229-47.

explores to what extent Christians can be Marxists without endangering their faith. First let us examine Gutiérrez's understanding of Marxism and the insights he draws from this philosophy to construct his theology of liberation.

Gutiérrez insists that he has never attempted a synthesis of faith and Marxist analysis. Further, he has never accepted a Marxist philosophy of the human person and atheism. Rather, Gutiérrez focuses primarily on Marx the historian, the successor and synthesiser of Hegel. In his theology, Gutiérrez employs Marxist ideas that help to explain the effects of capitalism on human beings. Marx's insights on the accumulation of surplus labour and class stratification in industrial society are useful for understanding the causes of poverty and exploitation in the Third World. Gutiérrez, however, does not accept the overall vision of Marx. In fact, he rejects the materialism and economic determinism of Marxist philosophy because it goes against his idea of integrative liberation and freedom.[1]

Hegelian Influence

As mentioned above, Gutiérrez views Marx as an inheritor of Hegelian thought. Influenced by Hegel, Marx understood the centrality of history and the role of human beings in this historical process. Gutiérrez holds that Hegel's philosophy is a reflection of the French Revolution, a historical event that had great repercussions because 'it proclaimed the right of all to participate in the direction of the society to which they belong'.[2] Hegel believed that one is aware of oneself by being recognised by another person. However, 'being recognised by another presupposes an initial conflict, "a life-and-death struggle", because it is "solely by risking life that freedom is obtained"'.[3]

Hegel speaks of the master-slave dialectic, which is a historical process that appears as the 'genesis of consciousness' which eventually leads to human liberation. 'Through the dialectical process humankind constructs itself and attains a real awareness of its own being: it liberates

1. Curt Cadorette, *From the Heart of the People: The Theology of Gustavo Gutiérrez* (South Humphrey: Meyer-Stone Books, 1988), 84. Leonardo Boff says liberation theologians make use of Marxist insights for their practical usefulness in analysing situations suffered by the poor. They are not interested in Marx as such. Thus, there is no question of engaging in a systematic reflection on the relationship between Marxism and Christianity. Leonardo Boff, 'Vatican Instruction Reflects European Mind-Set' (August 31, 1984) in Hennelly, *Liberation Theology*, 418.
2. Quoted in Gustavo Gutiérrez, *A Theology of Liberation*, 19.
3. Ibid.

itself in the acquisition of genuine freedom which through work transforms the world and educates the human species.'[1] According to Hegel, world history is this gradual awareness of one's freedom, and the driving force of history is this conquest of freedom, hardly observable in the early stage. 'It is Freedom in itself that comprises within itself the infinite necessity of bringing itself to consciousness and thereby, since knowledge about itself is its very nature, to reality.'[2]

While Hegel had a magnificent sense of history, he had little idea of the miseries and exploitations that most German workers suffered in the eighteenth and nineteenth centuries. His grand vision of freedom is too abstract and too far removed from the squalor and oppression that workers experienced during his time. Hegel believed that the purpose of labour is to enable people to construct a just and free society. The reality is that labour has been turned into a commodity bought and sold in the capitalist market, its value determined by supply and demand. Most workers could hardly earn enough to keep themselves alive, let alone reflect on the meaning of the historical process.[3]

If Hegel's high-flown philosophy was to have any relevance and impact, it had to be brought down to earth. Marx revived and deepened the Hegelian line of thinking by making an 'epistemological break' with previous thought.[4] This means that the Hegelian sense of history has to be transformed into a vision capable of overcoming the dehumanising influence of the capitalist system. This requires a deep understanding of the relationship between cultural values, economic activity and historical process.

Karl Marx

To do this, Marx situated himself between the old materialism and the new idealism by presenting his position as 'the dialectic transcendence of both'.[5] In this way, he affirmed the objectivity of the external world and at the same time retained the transforming power of the human person. For Marx, to know something is to be able to change it: '[T]he transformation of the world through work.'[6] With this idea, Marx gained an insight of historical reality. He examined the capitalist society and discovered concrete evidence of exploitation of one class of people by another class.

1. Ibid.
2. Ibid.
3. Cadorette, *From the Heart of the People*, 85.
4. Gutiérrez, *A Theology of Liberation*, 19.
5. Ibid.
6. Ibid.

Marx had observed that one of the pillars of the capitalist society was the belief in individualism – the independence of the person. A successful person is one who is economically independent and discrete: 'Individualism is the most important aspect of bourgeois ideology. . . . Individual initiative and interest are the starting point and motor of economic activity.'[1] A person's worth is thus measured by the amount of autonomy he or she possesses. This autonomy can be purchased with money. Gutiérrez laments that human dignity is measured in capitalist societies by material possessions and social prestige rather than by a sense of solidarity.

The teaching of Marx regarding individualism in society has significance in Gutiérrez's theological reflections. The excessive individualism in capitalist society is contrary to the spirit of solidarity expressed in Scripture. Unwittingly, Marx helps to explain the cause of sinfulness in our society. In fact, Marx understood that personal freedom and self-determination are highly prized by societies characterised by fierce competition among individuals and social classes. Personal freedom and self-determination is part of the bourgeoisie ideology whose society is enthralled in capital accumulation at the expense of the working class.[2]

Gutiérrez believes it is this relentless acquisition of wealth that continues to be the guiding principle of capitalism. He points out that capitalism claims to reflect nature – that we are competitive animals stalking in the new jungle called the free market. Economic competition is thus logical and natural. From his experience in the slums of Lima, Gutiérrez knows that this so-called free play of individual interests and the market has nothing to do with the general interest and welfare of society. The dehumanising situation in Third World nations, the existence of poor people, is simply neither natural nor logical. The suffering of the poor is the result of a sinful situation created and sustained by the self-interest of a particular class.[3]

Marx's understanding of labour is another contribution to Gutiérrez's theology. In capitalist society, those without wealth have to sell their labour for a living. Thus labour has been utilised and exploited as a commodity by the rich. Since labour is just a commodity rather than an expression of human creativity, it loses its reference to its human source. As a result, what is deepest and most sacred in human nature, our power to create, is taken away from the poor, who become 'non-persons', according to Gutiérrez.[4]

1. Quoted in Cadorette, *From the Heart of the People*, 85.
2. Ibid., 86.
3. Ibid., 87.
4. Ibid.

The genius of Marx lies in his ability to point out the existence of exploitation and class struggle as part of the capitalist system. Marx had studied these defects of industrial societies and, because of his insights, Gutiérrez believes that the defects of capitalism cannot be overcome until the poor are conscientised and become aware of the cause of their sufferings. The poor must see themselves as agents of change in history, and as people who have the right to determine how their society will function so that their interests are protected. Marx challenged us to come to terms with history and society as objective phenomena that can be altered because they are of our own making.

Marx paved the way for critical thinking by making people more aware of their social and economic realities as 'ideologically constructed'.[1] Such insights will help people to have greater control of their 'historical initiatives' – the efforts required to transform society from a capitalist to a genuinely socialist system.[2] Socialism, Marx believed, would help people to live freely and humanely by abolishing private acquisition of excessive wealth.

Gutiérrez, however, insists that human beings need more than just liberation from physical servitude. They also need interior or psychological liberation. In this psychological liberation, Gutiérrez employs the insights of Freud to help us understand our unconscious motivations and repression. He laments that, unfortunately, psychological liberation has not been satisfactorily integrated with historical liberation. It is dangerous to neglect the psychological aspect of liberation if we are to construct a new society. Gutiérrez maintains that the personal aspect of liberation actually encompasses all human dimensions.

Herbert Marcuse

Under the influence of Hegel and Marx, Herbert Marcuse denounces the oppression that exists in advanced capitalist society. Marcuse challenges the values promoted by society that denies human beings their right to live freely. According to Marcuse: 'The specter of a revolution which subordinates the development of the productive forces and higher standards of living to the requirements of creating solidarity for the human species, for abolishing poverty and misery beyond all national frontiers and spheres of interest, for the attainment of peace.'[3]

1. Gutiérrez, *A Theology of Liberation*, 20. McLellan asserts that both Marxism and liberation theology share a critical and self-reflexive attitude. David McLellan, *Marxism and Christianity* (London: Macmillan Press Ltd., 1987), 153.
2. Ibid.
3. Quoted in Gutiérrez, *A Theology of Liberation*, 21.

Gutiérrez understands that the ideas of Hegel, Marx, and Marcuse are not to be accepted uncritically. Their teachings must be considered in the light of history and in the light of praxis – whether they are feasible in various social-cultural realities, which are very different from the situations whence these ideas originally emerged. In other words, we need to examine if these Western philosophical ideas can be applied to the Latin American, African or Asian contexts effectively.

At the same time, this caution should not lead us to dismiss these ideas out of hand. Gutiérrez views history as a process of human liberation, which cannot be obtained without a fight against all the forces that oppress humankind. The aim of liberation is not only to attain better living conditions but also to change unjust social and economic structures. It is above all, 'a new way to be human, a *permanent cultural revolution*'.[1] This implies a dynamic understanding of the human person and history, which are constantly evolving.

While Gutiérrez is anxious to show the contribution of Marxist analysis to the understanding of social reality, he also insists that he has never suggested a dialogue with Marxism:

> . . . once the situation of poverty and marginalization comes to play a part in theological reflections, an analysis of that situation from the sociological viewpoint becomes important, and thinkers are forced to look for help from the relevant disciplines. This means that if there is a meeting, it is between theology and the social sciences, and not between theology and Marxist analysis, except to the extent that elements of the latter are to be found in the contemporary social sciences, especially as these are practised in the Latin American world.[2]

Further, Gutiérrez holds that the use of social disciplines for a better grasp of the social condition implies respect for the autonomy of these subjects and the political sphere. They are relevant to theology to the extent that they encompass the human problems and challenges in evangelisation. However, it is not the function of liberation theology to offer comprehensive political solutions or propose political alternatives. Theology must take into account the contribution of social sciences but it must return to its own sources in its reflections.[3]

1. Ibid, 21.
2. Gutiérrez, *The Truth Shall Make You Free*, 63-64.
3. Ibid., 65-66.

The Dominican, Yves Congar, an influential theologian during Vatican II, had also advocated this approach of employing social sciences to aid theology. According to Congar, it is appropriate for theology to use other sciences for its own purposes; as a 'moderator of other sciences, theology holds a role of fulfilment, unification, and organization with regard to man's spiritual experiences'.[1] It would be an error for theology 'to admit only immediate causes and so to remain in the limits of a strictly technical viewpoint, it is also wrong to become attached only to transcendent explanations by the efficient cause and the ultimately final cause while neglecting all immediate cause'.[2] This kind of error in theology, Congar warns, would easily degenerate into clericalism and false supernaturalism. In the Latin American situation, it means a tendency to spiritualise the faith and to ignore the plight of the poor and suffering.

In spite of Gutiérrez's explanation about the proper use of Marxist analysis, some still questioned the legitimacy of his approach. Most would agree that his incorporation of social theory into his theological reflections represents a significant new approach. From the above discussion, it is clear that there is no question of subjecting divine revelation to scientific verification. Gutiérrez is merely interested in using the best available tools to analyse the situation of the poor in Latin America so that the Church can carry out its task of evangelisation effectively. He insists that Christians must interpret the harsh realities of poverty only in the light of faith.

Admitting that social sciences help us understand better the social realities of our present situation, Gutiérrez also cautions that these disciplines need to be critically examined because their findings are not beyond dispute. Regarding the use of Marxist categories in social analysis, Gutiérrez mentions the guidelines given by Father Pedro Arrupe, the Superior General of the Jesuits (1965-1983), which he followed to some extent.

Arrupe's Advice

In his letter to the Jesuit Provincials in Latin America, dated 8 December 1980, Arrupe asserts that the adoption of Marxist analysis rarely means only adopting the method. It usually involves accepting the substance of the explanation. This means that we cannot accept Marxist analysis

1. Yves M.J. Congar, O.P., *A History of Theology*, translated and edited by Hunter Guthrie, S.J. (New York: Doubleday, 1968), 266.
2. Ibid.

uncritically – 'we cannot admit any *a priori*'.[1] In Marxism, historical materialism is understood in a reductionist sense, which is prejudicial to the Christian faith. However, this does not mean that Christians should not pay attention to economic factors when analysing social reality. We just have to keep a distance from an analysis that views economic factors in a reductionist sense. If reality is viewed solely from a function of production relations, then Christianity is quickly 'relativized and diminished'. Furthermore, Marxism promotes a radical criticism of the Church that is 'beyond the limits of appropriate fraternal corrections within *ecclesia semper reformanda*', Arrupe maintains.[2] He has observed that theologians who adopt Marxist analysis tend to be severely and unjustly critical of the Church.

While there is a connection between class struggle and sin, Arrupe warns that human history cannot be reduced to this antagonism alone: 'Social reality cannot be understood solely in light of the master-dialectic.'[3] There is also the presence of alliance, peace, and other forces that influence our human history. Disapproving of the idea of class struggle and violence that is implicit in Marx's teaching, Arrupe urges Christians to use moral persuasion, reconciliation and witness to bring about social transformation: 'Only as a means of last resort will they have recourse of struggle, especially if it involves violence, to combat injustice.'[4]

Arrupe admits that adopting Marxist analysis does not mean adopting its philosophy wholesale. Nonetheless, taking such an approach is commonly understood as accepting a philosophy of human history that contradicts Christian anthropology and understanding of society. Ultimately, Marxist analysis threatens Christian values. It is also not easy to make a careful distinction between Marxist analysis and its materialistic philosophy. Even Marxists themselves reject any separation between analysis and their worldview or principles of action.

In spite of his criticism of Marxist ideology, Arrupe also encourages dialogue and collaboration with Marxists without sacrificing Christian identity. He warns that reservations about Marxist analysis should not lead to diminishing the commitment to justice and the cause of the poor: 'Have we not often seen forms of anti-communism that are nothing but means of concealing injustice?'[5] In other words, we must not let anyone exploit our critical assessment of Marxism so that they can

1. Pedro Arrupe, 'Marxist analysis by Christians', *Origins* 10, (April 16, 1981), 691.
2. Ibid.
3. Ibid., 692.
4. Ibid.
5. Ibid., 693.

continue perpetuating unjust social and economic structures. Arrupe is optimistic that Marxist analysis can be modified in the future, as there is room for further study and research. Arrupe holds that in theory there is a distinction between Marxist analysis and Marxist philosophy, but in practice it is difficult to make this distinction, especially when we use Marxist categories uncritically.

Gutiérrez appears to be more optimistic than Arrupe regarding the usefulness of Marxist analysis in theological reflections. While acknowledging the contribution of Marxist analysis, Gutiérrez insists on making a distinction between using its theory and adopting its ideology. For Gutiérrez, using Marxist analysis does not mean accepting Marxism and its godless ideology. Accepting an atheistic ideology would immediately cut us off from the Christian faith. It would no longer be a theological issue. Further, Gutiérrez does not accept the totalitarian version of history promoted by Marx because it denies human freedom.[1]

In sum, Gutiérrez discards two aspects of Marxism – its godless ideology and its totalitarian vision of history. He acknowledges the use of Marxist analysis in his theology of liberation but he rejects the philosophical and ideological aspects of this discipline. Influenced by Antonio Gramsci, an Italian neo-Marxist theorist, Gutiérrez thinks that Marxist analysis can be separated from its 'metaphysical materialism'.[2] This means that one can adopt certain Marxist tenets without embracing its entire materialist philosophy.

A Philosophy of Praxis

According to Antonio Gramsci, 'It is essential to destroy the widespread prejudice that philosophy is a strange and difficult thing just because it is the specific intellectual activity of a particular category of specialists

1. Gutiérrez, *The Truth Shall Make You Free*, 61. David McLellan holds that Marxism is a kind of Christian heresy. David McLellan, *Marxism and Christianity* (London: Macmillan Press Ltd., 1987), 2.
2. Ibid., 62. While admitting the shortcomings of using Marxist theology in liberation theology because of its denial of God, Bonino believes that Marxism can be understood by Christians as a scientific theory necessary for the transformation of the human condition. It is also necessary for 'a humanism that presides over and stimulates the search for liberating action'. However, Marxism is ultimately insufficient because it 'alienates' people from their relation to God. Bonino admits that this distinction may not be acceptable to many Marxists, but it can assist Christians to understand the total nature of liberation that can only occur through faith in Jesus Christ. José Míguez Bonino, 'Theology and liberation', *International Review of Mission* 61, no. 241 (January 1972), 4. See also Maritain, *True Humanism*, 27-52.

or of professional and systematic philosophers.'[1] Thus, Gramsci adds, '[E]veryone is a philosopher, though in his own way and unconsciously, since even in the slightest manifestation of any intellectual activity whatever, in "languages", there is contained a specific conception of the world, one then moves on to the second level, which is that of awareness and criticism.'[2] Gutiérrez thinks that what Gramsci says of philosophy is also true of theology. All Christians are called to be theologians to reflect on the realities and conditions of their lives in the light of faith.

Gramsci speaks of a philosophical movement that is devoted to establishing a 'specialised culture' by some intellectuals for the purpose of elaborating forms of thought that are superior to 'common sense' and at the same time remaining in contact with the masses or simple folk. Only by this contact with the 'simple', Gramsci insists, can philosophy become 'historical' and 'purify itself of intellectualistic elements of an individual character and become "life"'.[3]

In view of the above, a philosophy of praxis has to be polemical and critical because it challenges 'common sense' and attempts to promote equality by levelling differences to demonstrate that everyone is a philosopher. Gramsci thinks that the Catholic Church is neither capable nor willing to raise the 'simple' to the level of the intellectuals. Instead the Church tries to impose 'an iron discipline on intellectuals so that they do not exceed certain limits of differentiation and so render the split [between simple and intellectual believers] catastrophic and irreparable'.[4] Gramsci argues that in the past, strong mass movements were absorbed in the establishment of the mendicant orders led by strong personalities such as St Dominic de Guzmán (1170-1221) and St Francis of Assisi (1181-1226).

The philosophy of praxis, Gramsci maintains, is different from the Catholic mentality because it does not leave the simple people in their primitive thought of common sense but lifts them up to a higher level of consciousness. It maintains contact with the 'simple' in order 'to

1. Antonio Gramsci, *Selections from the Prison Notebooks*, edited and translated by Quintin Hoare and Geoffrey Nowell Smith (London: Lawrence and Wishart, 1971), 323.
2. Ibid.
3. Ibid., 330.
4. According to Gramsci, 'The heretical movements of the Middle Ages were a simultaneous reaction against politicking of the Church and against the scholastic philosophy which expressed this. They were based on social conflicts determined by the birth of Communes, and represented a split between masses and intellectuals within the Church.' Ibid., 331.

construct an intellectual moral bloc which can make politically possible the intellectual progress of the mass and not only of small intellectual groups'.[1]

Gramsci also thinks that the 'active man-in-the-mass' has a 'contradictory consciousness' in the sense that he may be conscious of his situation but does not act appropriately. In other words, he is politically passive. Gramsci believes that 'critical understanding of self takes place therefore through a struggle of political "hegemonies" and of opposing directions, first in the ethical field and then in that of political proper, in order to arrive at the working out at a higher level of one's own conception of reality. Consciousness of being part of a particular hegemonic force [. . . political consciousness] is the first stage towards further progressive self consciousness in which theory and practice will finally be one.'[2] Thus Gramsci believes that our conception of reality must move beyond 'common sense'. In other words, we must be critically conscious of our human existence and we must not accept things as they are, especially when injustice and exploitation prevail. This understanding is central to the theology of liberation.

Christian Praxis

From the perspective of liberation theology, Christians and Marxists understand knowledge not as abstract truths but as concrete engagement with human reality. For Marxists, it is a revolutionary commitment and for Christians, it is historical praxis that takes place under the covenant with God. This commitment and praxis are related to their solidarity with the oppressed and the alienated for Christians and Marxists share 'an ethos of human solidarity' with the poor.[3] In their search for justice, this solidarity with the downtrodden unites them in their fight against inhuman and oppressive structures in society. This is not merely a 'tactical co-operation' but a 'strategic alliance'.[4] Nonetheless, we should not forget that the ultimate horizons of Christians and Marxists are very different. Marxism is an atheistic ideology that calls for revolution on earth, while Christians view everything from the perspective of faith and the *parousia*.

1. Ibid., 332-33.
2. Ibid., 333.
3. José Míguez Bonino, *Christians and Marxists*, 119.
4. Ibid. For a critical discussion of the relationship between theory and practice by Habermas, see Joseph Kroger, 'Prophetic-critical and practical-strategic tasks of theology: Habermas and liberation theology', *Theological Studies* 46, no. 1 (March 1985).

Baptising Gramsci's understanding of the philosophy of praxis, as it were, Gutiérrez holds that liberation theology is 'a critical reflection on Christian praxis in light of the word of God'.[1] It is a praxis of solidarity inspired by the Gospel. This includes friendship and sharing the life of the poor. Christian praxis involves a 'lived faith' that is expressed through prayer and commitment. It puts into practice the values of the reign of God – this is the basic element of Christian living and regarded by Gutiérrez as the first act of theology.

The second stage of theological work is the reflection of this commitment or praxis in the light of God's word. Gutiérrez says that '[T]he ultimate norms of judgment come from the revealed truth that we accept by faith and not from praxis itself.'[2] This revealed truth or deposit of faith is not just a set of rigid rules; it is based on the lived experience of the Church and is thus capable of inspiring us to commit ourselves to God as well as helping to strengthen the relationship between orthopraxis and orthodoxy.

Johan Baptist Metz, whose political theology has influenced Gutiérrez, admits that, in theology, moral praxis cannot be socially or politically neutral. There is a situation where a person 'has not yet come of age and is impotent and oppressed which is not simply due to the moral weakness of those who have not yet come of age or are impotent and oppressed'.[3] This 'socially conditioned failure to come of age', or poverty, is an important consideration for Christian praxis.[4] Here Metz foreshadows the birth of

1. Gutiérrez, *A Theology of Liberation*, xxix.
2. Ibid., xxxiv. Following Clodovis Boff, Bennett holds that the practice of liberation theology requires three moments: 'the moment of praxis, the moment of reflection on praxis, and the moment of return to a renewed praxis. It begins and ends with praxis.' Zoë Bennett, '"Action is the life of all": the praxis-based epistemology of liberation theology' in Rowland, *The Cambridge Companion to Liberation Theology*, 39.
3. Johan Baptist Metz, *Faith in History and Society: Toward a Practical Fundamental Theology*, translated by David Smith (New York: The Seabury Press, 1980), 54.
4. Ibid. Gramsci puts it this way: 'That the objective possibilities exist for people not to die of hunger and that people do die of hunger, has its importance. . . . But the existence of objective conditions, of possibilities or of freedom is not yet enough: it is necessary to "know" them, and know how to use them. . . . That ethical "improvement" is purely individual is an illusion and an error: the synthesis of the elements constituting individuality is "individual", but it cannot be realised and developed without an activity directed outward, modifying external relations both with nature and, in varying degrees, with other men, in the various social circles in which one lives, up to the greatest relationship of all, which embraces the whole human species.' Quoted in Richard Kilminster, *Praxis and Method: A Sociological Dialogue with Lukács, Gramsci and the Early Frankfurt School* (London: Routledge & Kegan Paul, 1979), 177.

liberation theology in the developing world, those nations that have not come of age or are impotent and oppressed. Metz insists that Christian praxis must be concerned not just with the spiritual aspect of persons but also with their miserable and oppressed living conditions:

> The faith of Christians is a praxis in history and society that is to be understood as hope in solidarity in the God of Jesus as a God of the living and the dead who calls all men to be subjects in his presence. Christians justify themselves in this essentially apocalyptical praxis (of imitation) in their historical struggle for their fellow men. They stand up for all men in their attempt to become subjects in solidarity with each other.[1]

Apocalyptical praxis here means that this theological approach of Metz is characterised by the primacy of eschatology and faith expressed as hope, in solidarity with the living, especially with those who are suffering, and the dead. The political theology of Metz aims to express Christ's liberating force in the history of human suffering and it does not ignore the 'problem of their painful non-identity'.[2] In other words, Metz's practical fundamental theology is concerned with what Gutiérrez calls 'nonpersons' or those who have been absent from mainstream history.

Another theologian who influenced Gutiérrez's work is the Protestant, Jürgen Moltmann, who warns that if the Church fails to be involved in the social transformation of humankind, some other movements will take over: 'Only because the Church limited itself to the soul's bliss in the heavenly beyond and became docetic did the active hope of bodily salvation wander out of the Church and enter into social-change utopias.'[3] This means that the Church as well as individual Christians must be able to recognise the spirit of Christ in social transformation. Further, Moltmann insists, 'Christians are obligated to bring, with the Gospel and

1. Ibid., 73. See also Johannes B. Metz, *Theology of the World*, translated by William Glen-Doepel (London: Burns and Oates, 1969).
2. Ibid., 229. According to Li and Rowland, hope is integral to the Marxists and liberation theology. 'Hence the eschatology of both Marxism and liberation theology is an optimism in which "hope" plays a crucial role. . . . For both Marxism and liberation theology, hope is an orientation toward the future of the human being whose action is the foundation for the fulfillment of the hope that will eventually result in improvement for living in this world.' Li and Rowland, 'Hope: the convergence and divergence of Marxism and liberation theology', 184.
3. Jürgen Moltmann, 'Toward a political hermeneutics of the gospel', *Union Seminary Quarterly Review* 23, no. 4 (1968), 320. For a discussion of Protestant liberation theologians and their influence, see Alan Neely, 'Liberation theology in Latin America: antecedents and autochthony', *Missiology* 6, no. 3 (July 1978), 356-65.

with their fellowship, the justice of God and freedom into the world of oppression. Men do not hunger for bread alone. In the most elementary way, they hunger for recognition and independence.'[1]

In the same way, if the Church limits itself to the forgiveness of moral and spiritual sins, the human desire for justice will move out of the Church and enter into other social and political movements in search of freedom and independence. The many revolutions that are occurring in Latin America, Africa and Asia demonstrate this longing for freedom and self-determination. Moltmann believes this is an open opportunity for Christians to commit themselves to the cause of freedom of faith in a repressed society. According to Moltmann's political hermeneutics, Christian faith should help people resolve social, political and personal conflicts. In other words, the Church should not confine itself to the spiritual and moral realms.

Warnings

In spite of Gutiérrez's explanation of the nature of his approach, some critics still view liberation theology as the radical left-wing of Western progressive theology. John Paul II warned against these 're-readings' of the Gospel in his address at Puebla, Mexico, in 1979:

> In fact, today there occur in many places – the phenomenon is not a new one – 're-readings' of the Gospel, the result of theoretical speculations rather than authentic meditation on the word of God and a true commitment to the Gospel. They cause confusion by diverging from the central criteria of the faith of the Church, and some people have the temerity to pass them on, under the guise of catechesis, to the Christian communities.[2]

Insisting that pastoral work must be based on a correct understanding of liberation, John Paul II warned: 'Liberation that in the framework of the Church's proper mission is not reduced to the simple and narrow economic, political, social or cultural dimension, and is not sacrificed to the demands of any strategy, practice or short-term solution.'[3] The Church magisterium also set forth guidelines for a proper Christian method of employing Marxist theory:

1. Ibid., 321.
2. Address of His Holiness John Paul II, Puebla, Mexico, Sunday, 28 January 1979, https://w2.vatican.va/content/john-paul-ii/en/speeches/1979/january/documents/hf_jp-ii_spe_19790128_messico-puebla-episc-latam.html. I.4.
3. Ibid., III.6.

> While, through the concrete existing form of Marxism, one can distinguish these various aspects and the questions they pose for the reflection and activity of Christians, it would be illusory and dangerous to reach a point of forgetting the intimate link which radically binds them together, to accept the elements of Marxist analysis without recognizing their relationships with ideology, and to enter into the practice of class struggle and its Marxist interpretations, while failing to note the kind of totalitarian and violent society to which this process leads.[1]

These warnings from the Vatican resulted in the publications of two documents from the Congregation for the Doctrine of the Faith (CDF) directed by Joseph Ratzinger in 1984 and 1986. As we shall see, much of the content of these two documents are actually consonant with Gustavo Gutiérrez's approach to liberation in the Christian context.

Libertatis Nuntius

The *Instruction on certain aspects of the 'Theology of Liberation'*, also known as *Libertatis Nuntius* (1984), aims to inform pastors, theologians and all the faithful of risk of damage to the faith that are caused by certain forms of liberation theology, one of the main errors of which, it is claimed, is the uncritical manner in which it employs Marxist concepts. The document, however, recognises the validity of the term, 'theology of liberation', because it is rooted in the Biblical theme of liberation, especially in the Book of Exodus. This *Instruction* reminds us that the Church has always been concerned about the poor and the oppressed, by awakening Christian consciences to justice and social responsibility.

The *Instruction* approved the 'preferential option for the poor' but warns of the temptation to reduce the Gospel to an earthly one. In Puebla, the preferential option was for both the poor and the young. It seems that the theology of liberation, for ideological purposes, perhaps, chose to drop 'the young' in focusing exclusively on the poor. For the CDF, authentic theology must be rooted in the Word of God, 'correctly

1. *Octogesima Adveniens*, Apostolic letter of Pope Paul VI, http://w2.vatican.va/content/paul-vi/en/apost_letters/documents/hf_p-vi_apl_19710514_octogesima-adveniens.html, no. 34. See also Anselm Kyongsuk Min, 'The Vatican, Marxism, and Liberation Theology', *Cross Currents* 34, no. 4 (1984), 439-55. Regarding the Catholic Church's opposition towards Marxism, see Chapter 3, 'The Church: From Anathemas to Christian Marxists', in McGovern, *Marxism*, 90-131.

interpreted'.[1] We may ask whose interpretation is correct. *Libertatis Nuntius* highlights the fact that of the several liberation theologies, some are considered dangerous and unorthodox and are thus rejected by the magisterium. It recognises that Marxism poses many questions that Christians can reflect upon, but warns that it would be dangerous and illusory to accept elements of Marxist analysis without recognising its godless ideology and its emphasis on class struggle. The term 'class struggle' is not just a case of severe social conflict, but is pregnant with Marxist understanding of revolution and violence as a means of transforming society. The *Instruction* warns that 'Those who use similar formulas, while claiming to keep only certain elements of the Marxist analysis and yet to reject the analysis taken as a whole, maintain at the very least a serious confusion in the minds of their readers.'[2]

Marxist anthropology is also not compatible with Christian conceptions of humanity and society: atheism and denying the human person his liberty and rights, the document holds, are at the core of Marxist philosophy; thus, 'to attempt to integrate into theology an analysis whose criterion of interpretation depends on this atheistic conception is to involve oneself in terrible contradictions'.[3] The use of analytical methods in theological reflection must be carried out in the light of faith. Human sciences are merely instrumental. The criterion for truth can only be theological. This is also the position of Gustavo Gutiérrez.

The *Instruction* claims that when liberation theologians accept certain aspects of Marxist philosophy they are also obliged to accept a series of positions which are incompatible with the Christian vision of humanity. These positions are related to the issue of class struggle which is the core of Marxist analysis: 'For the Marxist, the truth is a truth of class: there is no truth but the truth in the struggle of the revolutionary class.'[4] This implies that society is founded on violence. Such an understanding goes against Christian emphasis of forgiveness and reconciliation.

As we can see, except for this condemnation of class struggle in Marxist thought, the *Instruction*'s understanding of liberation theology does not go against the approach and methodology taken by Gustavo

1. Congregation for the Doctrine of the Faith, *Instruction on certain aspects of the 'Theology of Liberation'*, http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_19840806_theology-liberation_en.html. VI. A New Interpretation of Christianity, no. 7.
2. Ibid. VII. Marxist Analysis, no. 8.
3. Ibid. VII. Marxist Analysis, no. 9.Regarding atheism and Marxism, see Quentin Lauer, 'Response occasioned by McGovern's "Atheism, is it essential to Marxism"', *Journal of Ecumenical Studies* 22, no. 3 (1985), 524-28.
4. Ibid. VIII, Subversion of the Meaning of Truth and Violence, no. 5.

Gutiérrez in his understanding of liberation. Far from denouncing liberation theology, the *Instruction* endorses the concept. Two years later, in 1986, the CDF issued another instruction, *Libertatis Conscientia,* this time less critical and more accommodating to the efforts of liberation theologians.

Libertatis Conscientia

The Vatican has warned that proponents of liberation theology may get carried away by socio-politico activism and neglect the fundamental aim of doing theology – that is, to reflect on the Word of God. *Libertatis Conscientia* (1986) known as the *Instruction on Christian Freedom and Liberation*, signed by the Prefect of the Congregation for the Doctrine of the Faith, Joseph Ratzinger, assures us that the Church is determined to respond to the anguish of the modern person as he or she endures oppression and longs for freedom. At the same time, the *Instruction* reminds us that the Church is not directly responsible for the running of the social and economic systems. While the Church speaks of the promotion of justice, its mission is not tied exclusively to the socio-ethical dimension of the temporal order. Nonetheless, the Church is 'being faithful to her mission when she exercises her judgment regarding political movements which seek to fight poverty and oppression according to theories or methods of action which are contrary to the Gospel and opposed to man himself'.[1]

Endorsing the preferential option for the poor, this *Instruction* clearly teaches that 'those who are oppressed by poverty are the object of a love of preference on the part of the Church'.[2] In loving the poor, the Church affirms that a person is not measured by what they have but what they are. A person's dignity cannot be destroyed, however miserable their situation, and the Church shows its solidarity with those who are marginalised in and alienated from society. This option for the poor, this *Instruction* says, excludes no one, as Gutiérrez has always claimed.

This document also advocates the utilisation of social sciences to aid in theological research in order to enhance our understanding of political and economic systems: 'This social teaching has established itself as a doctrine by using the resources of human wisdom and the sciences. . . . It takes into account the technical aspects of problems but always in order

1. Congregation for the Doctrine of the Faith, *Instruction on Christian Freedom and Liberation*, http://www.vatican.va/roman_curia/congregations/cfaith/documents/rc_con_cfaith_doc_19860322_freedom-liberation_en.html, no. 65.
2. Ibid., no. 68.

to judge them from the moral point of view . . . it requires the contribution of all charisma, experiences and skills.'[1] Above all, this document stresses the fundamental principles of love and solidarity in doing theology, and opposes all kinds of political and social individualism and collectivism.

While this *Instruction* emphasises the priority of the person, his conversion, it also emphasises the need to remove unjust social and economic structures. This document holds that sin is a personal affair, the origin of all injustice, and only in a derived and secondary sense can we speak of 'social sin'.[2] This *Instruction* also condemns violence and class struggle as a way of achieving liberation. At the same time, it is critical of passivity on the part of authorities in places where human rights are violated. As a last resort, the Church permits the use of armed struggle to get rid of longstanding tyranny.

The role of the laity is emphasised in this document as it reminds us that the pastors of the Church cannot be involved directly in the political construction of social life. The laity has a very important role to play in the establishment of the Kingdom of God on earth. History is one, as Gutiérrez argues. In the same way, the *Instruction* states: 'The work of salvation is thus seen to be indissolubly linked to the task of improving and raising the conditions of human life in this world. The distinction between the supernatural order of salvation and the temporal order of human life must be seen in the context of God's singular plan to recapitulate all things in Christ.'[3]

Gutiérrez could not agree more with this document's statement that today's serious socio-economic problems cannot be solved 'unless new fronts of solidarity are created: solidarity of the poor among themselves, solidarity with the poor to which the rich are called, solidarity among the workers and with the workers'.[4]

As we have observed, this *Instruction* on certain aspects of the liberation theology is actually a validation of Gustavo Gutiérrez's work. There is no mention of Gutiérrez's name, nor is there an indictment of his teaching. Except for the outright condemnation of class struggle, which Gutiérrez believes is inevitable, this document from the CDF endorses the theology of liberation as sound teaching. Perhaps it was Gutiérrez's initial inadequate emphasis on the ecclesial context of his work and his over-emphasis on Marxist contributions that troubled the Vatican. Leaving aside these reservations, we can see that the theology

1. Ibid., no. 72.
2. Ibid., no. 75.
3. Ibid., no. 80.
4. Ibid., no. 89.

of liberation is the Christian theology of salvation. These instructions, issued by the CDF and signed by Joseph Ratzinger, represent the teaching of the magisterium. We will now examine Ratzinger's personal view of liberation theology.

Ratzinger's View

Ratzinger published his article, 'Liberation Theology', for the public press while an instruction was being prepared by his own CDF. His critique of liberation theology in this article seems sharper and more direct. He mentions three liberation theologians by name: Gustavo Gutiérrez, Jon Sobrino and Ignacio Ellacuría. Emphasising the importance of grounding Christian theology in the context of sound ecclesiology, Ratzinger approves the liberation movement promoted by the documents of CELAM from Medellín to Puebla. He is concerned only about those positions that are radically Marxist in their orientation.

Although liberation theology grew out of Latin American Catholicism, Ratzinger reminds us of its Western influence, referring to the writings of Bultmann, Marx and Marcuse. He considered the Marxist philosophies of Adorno, Horkheimer, Habermas and Marcuse to be totally unscientific.[1]

Ratzinger makes this interesting insight regarding liberation theology as a danger to the faith of the Church: 'Undoubtedly one must realize that an error cannot exist unless it contains a nucleus of truth. In fact, an error is much more dangerous to the extent that it contains a greater proportion of truth.'[2] He claims that error can never appropriate that portion of truth that is lived out in the faith of the Church. Nonetheless, Ratzinger acknowledges that liberation theology is very attractive and seductive because it contains a 'mixture of the fundamental truth of Christianity and the fundamental non-Christian option'.[3]

For Ratzinger, the ecclesial context is fundamental in any kind of theologising. He is concerned that liberation theologians do not take the magisterium seriously because of its insistence on permanent truths. Liberation theologians believe the magisterium thinks in terms of metaphysics, which contradicts the idea of 'history' being dominated by class struggle. Gutiérrez, for example, claims that class struggle is an actual fact, and thus it is not possible to be neutral. Ratzinger holds that

1. Ibid., 369.
2. Cardinal Joseph Ratzinger, 'Liberation Theology' (March 1984) in Hennelly, *Liberation Theology*, 367.
3. Ibid., 373.

'From this point of view, any intervention of the ecclesial magisterium is impossible.'[1] Further, Ratzinger claims that liberation theologians' concept of history absorbs the concept of God and revelation, meaning that the 'historicity' of the Bible would soon give way to the materialistic philosophy of Marx.[2]

Given the sad state of today's world, with its rampant poverty and injustice, many faithful Christians seek to abolish the unjust economic and political structures that perpetuate the miseries of the poor. They believe Christianity can be instrumental in the transformation of societies and this new interpretation of Christianity advanced by liberation theologians may be just the thing that the world needs now. To ignore this theology seems to be morally irresponsible. But Ratzinger warns us that this radical interpretation of Christianity may lead us to more serious errors, which in the long run will be detrimental to the poor themselves. Since liberation theology is essentially sound except for its uncritical use of Marxist analysis, many wonder if it is possible to be a Christian and a Marxist at the same time or *vice versa*.

Can a Christian Also be a Marxist?

Lawrence Bright, an English Dominican, who takes a very different view from Ratzinger regarding Marxism, says Christianity is not enough to understand social and political realities. It needs analysis and strategy, which Marxism provides. The Christian who uses forms of Marxism judges it as a Marxist, not as a Christian. But the Christian does not have to modify his religious faith in order to do this. He does not have to be a Christian Marxist or Marxist Christian. Perhaps in the West, it is difficult to accommodate these two different thoughts because the godless Marxist ideology has troubled many Christians in Europe. But in South America, where the culture is Catholic, the unjust and inhuman social situation makes it vital for Christians to co-operate with Marxists. There is not much of a choice. Bright writes: 'When one is dispossessed one is not a revolutionary simply on principle; what has to be done is clear, and one sets about doing it without waiting for justification from the Christian gospel or Marxist philosophy. One is Christian and Marxist because that's how things are.'[3]

1. Ibid., 372.
2. Ibid.
3. Quoted in José Míguez Bonino, *Christians and Marxists*, 17. See also William R. Barr, 'Debated issues in liberation theology', *Theology Today* 43, no. 4 (January 1987), 516-19.

Here, Bright attempts to preserve the integrity of the Christian as well as the autonomy of political commitment. He considers Marxism as purely a set of analytical tools to analyse capitalist and bourgeoisie society and to transform that society for the better. We can even accept Marx's criticism of religion as valid for criticising bourgeoisie Christianity. This criticism might assist in Church renewal and reform. In fact, this instrumental understanding of Marxism has gained wide acceptance by many political leaders in the Third World. They do not claim to be Marxists but they adopt Marxist theory and analysis in their revolutionary programmes.

It is thus legitimate to use Marxist insights as one might other analyses, as Bonino insists. Further, Bonino asserts that the Christian is morally obligated to do so if such analysis is reliable and useful to promote the Gospel. In so far as a Christian is involved in a socialist project, whether it is in China or Cuba, he cannot avoid relating to Marxism with different degrees of attachment.[1] Bonino argues that as long as a Christian views Marxism as a relative and not as an absolute philosophy, there is no reason why he cannot claim to be a Marxist in certain aspects, especially when he attempts to analyse the social and political realities which he considers inhuman. What is relevant in Marxism for a Christian is this commitment to solidarity, the desire to fight against oppression and exploitation for the cause of justice and peace.[2]

The triumph of capitalism and democracy means that few people now take seriously the godless ideology that Marx promoted. Many people have seen the failure of the socialist systems in Eastern Europe, including Russia. China is Communist only in its political structure, with an economic system that is essentially capitalistic. Perhaps the Vatican has realised that it has overreacted regarding the influence of Marxist thought on liberation theology and the best course to take now is to rehabilitate it. The Marxist dress that liberation theology puts on can easily be removed to reveal its core Christian principles.

1. José Míguez Bonino, *Christians and Marxists*, 122.
2. Ibid., 126.