

The Encyclical *Caritas in Veritate*: Christian Tradition and the Modern World

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I. Introduction

In 1895, Georg Jellinek published the first edition of his book *The Declaration of the Rights of Man and the Citizen*.¹ Its content gave rise to a heated debate. Jellinek argued that both the 1789 French Declaration of the Rights of Man and the Citizen and the analogous declaration in the United States (and similar declarations issued in the Western world) were ultimately the product of the struggles to safeguard religious freedom. “The idea of legally establishing the unrenounceable, innate, and sacred rights of man did not have a political but a religious origin. What until then had been considered the work of the revolution is, in reality, a product of the Protestant Reformation and its ensuing conflicts.”² Although the scope of this paper doesn’t permit a full investigation of this thesis and the many interesting questions it raises, I want to focus here on one question that Jellinek’s work entails: “Is there a substantial continuity between the Christian tradition and the modern world? Or, on the contrary, is modernity the result of a rupture and discontinuity with this Christian tradition?”³

When Max Weber wrote *The Protestant Ethic and the Spirit of Capitalism*,⁴ he was greatly influenced by Jellinek. Weber argued that it is not just material and economic forces that change the world, but also religious ones, and that the latter played a significant role in the evolution of Western industrial society.⁵

Pope Benedict XVI’s encyclical, although not drawing explicitly on the work of Max Weber, accepts many of his main points. Although its line of argument is not easy to grasp in a single reading,⁶ we will argue here that, in *Caritas in Veritate*, Benedict XVI seeks to highlight elements of the Christian tradition that can be of value for the modern economy, whose goal, according to the Pope, must be the integral development of mankind.

1. 2006 edition of Georg Jellinek’s *Die Erklärung der Menschen und Bürgerrechte: Ein Beitrag zur Modernen Verfassungsgeschichte*, third posthumous edition, revised and completed by Walter Jellinek, 1919. VDM Dr. Müller, publisher, Saarbrücken.

2. *Ibid.* p. 57.

3. Trutz Rendtorff discusses the work of Jellinek in light of this question in his essay “Menschenrechte als Bürgerrechte: Protestantische Aspekte ihrer Begründung,” in: Ernst-Wolfgang Böckenförde and Robert Spaemann (eds), *Menschenrechte und Menschenwürde: Historische Voraussetzungen—säkulare Gestalt—christliches Verständnis*, Klett-Cotta, Stuttgart (1987), 93ff. The following reflections on Max Weber and Jellinek are heavily indebted to Rendtorff.

4. Published for the first time under the title: “Die protestantische Ethik und der ‘Geist’ des Kapitalismus,” in *Archiv für Sozialwissenschaft und Sozialpolitik*, vol. XX and XXI (1905).

5. Cf. Trutz Rendtorff, *Menschenrechte*, 98.

6. For an introduction and a first approximation, see Lothar Roos, “Menschen Märkten und Moral: Die

Caritas in Veritate is the longest social encyclical in history, and in terms of content one of the richest. It offers many suggestions that could generate a change in the way of thinking in this area and lead to innovative points of view.

In this introduction to the Encyclical I would like to stress two of these points that seem particularly important to me. The first is the so-called “anthropological orientation” of the Church’s social doctrine stressed by *Caritas in Veritate*.⁷ Indeed, Benedict affirms that “the social question has been radically converted into an anthropological question.”⁸ An excessive reliance on mathematics and the exaggerated use of econometric methods in economics means that at times one doesn’t take into account the obvious human meaning of work.⁹ This reflects the desire to create an “exact” science modeled on the natural sciences in an area where this is impossible, that is, in the sphere of the human person, of his or her social and economic activity, of integral human development, etc. All these realities call for a different method. In the end, it should be the object studied that decides which method is to be employed and not the method that decides what object should be studied.

The second point I would like to consider here is the epistemological status of the Church’s social doctrine.¹⁰ This body of teaching is certainly theology, and specifically moral theology. But it is not only theology (insofar as based on revelation), but also anthropology (as a philosophy based on human reason). And since it speaks in the name of reason, the Church can demand a public forum. Moreover, “the social doctrine of the Church was born to revindicate a ‘status of citizenship’ for the Christian religion.”¹¹

We will now turn to the relationship between Christian tradition and the modern world and also consider the aspects of continuity and discontinuity found in the Church’s social teaching.

Pope Benedict XVI writes in his Encyclical: “The link between *Populorum Progressio* and the Second Vatican Council does not mean that Paul VI’s social magisterium marked a break with that of previous Popes, because the Council constitutes a deeper exploration of this magisterium within the continuity of the Church’s life. In this sense, clarity is not served by certain abstract subdivisions of the Church’s social doctrine, which apply categories to Papal social teaching that

Botschaft der Enzyklika Caritas in Veritate,” in *Kirche und Gesellschaft* No. 362, edited by Katholische Sozialwissenschaftliche Zentralstelle, Mönchengladbach, Bachem Köln (2009); Simona Beretta et al. (eds.), *Amore e Verità. Commento e guida alla lettura dell’Enciclica Caritas in Veritate di Benedetto XVI*, Paoline, Milano (2009); Benedetto XVI, *Caritas in Veritate, Linee guida per la lettura*, Giorgio Campanini (coord.), EDB, Bologna (2009); Various authors, *Carità Globale: Commento alla Caritas in Veritate*, LEV, Città del Vaticano (2009).

7. Cf. Benedict XVI, *Caritas in Veritate: Linee guida per la lettura*, op. cit., 25ff. See also Paul Josef Cordes, “Kirchliche Soziallehre und Offenbarung: Zur Enzyklika Caritas in Veritate,” in *Die Neue Ordnung* 5/2009, 234-332.

8. *Caritas in Veritate*, no. 75. Perhaps to highlight this aspect, rather than the publication date of *Rerum Novarum*, Benedict XVI chose the anniversary of *Populorum Progressio* for his social encyclical.

9. Cf. the observations of Peter T. Bauer, *Dalla sussistenza allo scambio: Uno sguardo critico sugli aiuti allo sviluppo*. IBL Libri, Turin (2009), 87.

10. Cf. Benedict XVI, *Caritas in Veritate: Linee guida per la lettura*, op. cit., 21.

11. Benedict XVI, *Caritas in Veritate*, June 29, 2009, no. 56.

are extraneous to it. It is not a case of two typologies of social doctrine, one pre-conciliar and one post-conciliar, differing from one another: on the contrary, there is a single teaching, consistent and at the same time ever new. It is one thing to draw attention to the particular characteristics of one Encyclical or another, of the teaching of one Pope or another, but quite another to lose sight of the coherence of the overall doctrinal corpus. Coherence does not mean a closed system: on the contrary, it means dynamic faithfulness to a light received. The Church's social doctrine illuminates with an unchanging light the new problems that are constantly emerging."¹²

The footnotes to this paragraph cite, together with the Encyclical *Sollicitudo Rei Socialis*, Benedict XVI's address to members of the Roman Curia on December 22, 2005. In it, the Pope referred to the correct interpretation of the new focus given by the Council. His main concern is the problem of transformation and permanence. He contrasts a "hermeneutic of discontinuity and rupture" with a "hermeneutic of reform" within the underlying continuity of the Church. This second type of hermeneutic was the one desired by the Second Vatican Council, in clarifying the relationship between the Church and modernity.

The Council certainly saw the need to carry out major steps of reform. The Pope highlights in his December 2005 address three important reference points: the relationship of the faith and the Church to the natural sciences, to the modern state and to other religions. "It is clear that in all these sectors, which all together form a single problem, some kind of discontinuity might emerge. Indeed, a discontinuity had been revealed but in which, after the various distinctions between concrete historical situations and their requirements had been made, the continuity of principles proved not to have been abandoned. . . . The Second Vatican Council, with its new definition of the relationship between the faith of the Church and certain essential elements of modern thought, has reviewed or even corrected certain historical decisions, but in this apparent discontinuity it has actually preserved and deepened her inmost nature and true identity."¹³ In this context, Benedict refers as well to the right to religious freedom. All these steps were taken in full accord with Christ's teachings, passing on a heritage deeply rooted in the Church's own life.

II. Catholic social doctrine and the modern economic order

In his December address mentioned above, the Pope referred explicitly to the relationship with the natural sciences, with the modern state, and with other religions. What importance does the modern free economy have here? Did Pope Benedict XVI include this implicitly in speaking about modernity? Or did he rather omit it deliberately? Isn't it a duty of the Church to be concerned about the *modernity of the economy*?

At first sight, it might seem that the Pope excluded economics from the topics in which a reconciliation between faith and reason has been attained. This could

12. *Ibid.*, no. 12.

13. Benedict XVI, Speech to the cardinals, archbishops, bishops, and prelate superiors of the Roman Curia, December 22, 2005. www.vatican.va.

be inferred, perhaps, from the address he gave on November 23, 1985. In it, Joseph Ratzinger showed himself to be decidedly critical in regard to economic liberalism.¹⁴ In that conference he argued that the capitalist economic system cannot be accepted in an uncritical way, not even if one adopts all the corrections that have been introduced since its inception. At the same time, the future Pontiff also rejected Marxism. His criticism of economic liberalism was directed against a tradition going back to Adam Smith maintaining that ethics and the market economy cannot be reconciled. According to this theory moral decisions were opposed to the laws of the market: moral economic activities—according to the view criticized by Joseph Ratzinger—had no chance of surviving in the world of the market. Ethics and the market were seen as irreconcilable, given that in economics what matters is efficiency, not morality. Ratzinger points to the determinism hidden in this position. The laws of the market alone, in a necessary and absolute way, were seen as leading to mankind's good and to progress, independently of the moral qualities of the persons who are acting.

However, the truth that needs to be defended is that the laws of the market have an autonomy and a validity that is only relative. They fulfill their function if they are grounded in a culture of ethical responsibility oriented to the common good, that is to say, in a context of consensus in regard to values. The economy is not put into effect solely by laws, but by persons. A simple adaptation to the “reality of the market and economic facts” would not recognize the true nature of man, and therefore would be unreal.

In the Encyclical *Centesimus Annus* of May 1, 1991, Pope John Paul II employed terminology that was much closer to the modern liberal tradition. In *Centesimus Annus*, basing himself on the Second Vatican Council, John Paul II gave a definitive right of citizenship to modern political culture in the teaching of the Church, including there the model of the free economy with a social concern. Reinhard Marx writes in this regard: “This interior logic of the functioning of the market economy was first discovered by Adam Smith, who described it systematically: this is a great contribution that cannot be denied. Economic liberalism was a great advance, as has been the entire development of freedom found in modern life. Nevertheless, it is now worthwhile emphasizing once more that in the face of economic liberalism, the Church has maintained a great reserve for a long time—for a longer time than in regard to political liberalism.”¹⁵

In that encyclical John Paul II also asked himself whether capitalism is now the victorious social system and the model to be followed. The response is obviously complicated. It is not just a question of a new terminology. The Pope took a

14. Joseph Ratzinger, “Marktwirtschaft und Ethik,” in Lothar Roos (ed.) *Stimmen der Kirche zur Wirtschaft*, Bachem, Köln(1986), 50-58 (available also at www.ordosocialis.de). Recently an Italian translation has been published: Joseph Ratzinger, “*Chiesa ed economia: Responsabilità per il futuro dell'economia mondiale*,” in *Communio* (Italian edition). Issue no. 218, 2008, 83-89.

15. Reinhard Marx, *Das Kapital. Ein Plädoyer für den Menschen*, Pattloch, München(2008), 82. There is an Italian translation: *Il capitale. Una critica cristiana alle ragioni del mercato*, Rizzoli, Milano (2009). Cf. also Martin Rhonheimer, “*La realtà politica ed economica del mondo moderno e i suoi presupposti etici e*

stand in favor of profit and the free market,¹⁶ and of a “good capitalism”—an economic system that recognizes the positive role of business enterprises and human creativity, of the free market and private property, and a corresponding responsibility in the use of the means of production. And he specified in regard to this “good capitalism” that “it would perhaps be more appropriate to speak of a ‘business economy,’ ‘market economy’ or simply ‘free economy.’” He rejected with the same force a “bad capitalism,” that is, the “system in which freedom in the economic sector is not circumscribed within a strong juridical framework which places it at the service of human freedom in its totality, and which sees it as a particular aspect of that freedom, the core of which is ethical and religious.”¹⁷

Caritas in Veritate has a different goal than *Centesimus Annus*. John Paul II wanted to provide orientation for the period that followed the collapse of the Soviet Bloc. Benedict XVI finds in the world economic crisis a pressing call for reflection, and seeks to provide an anthropological and Christian grounding for progress in the free economy. The two Pontiffs are speaking different languages. But, despite what might first seem to be the case, their message is not contradictory. *Caritas in Veritate* does not undo anything in *Centesimus Annus*; on the contrary, it presupposes and confirms it.

At first sight, however, one’s attention is drawn to the differences between *Centesimus Annus* and *Caritas in Veritate*. Benedict XVI defends a strengthening of state sovereignty;¹⁸ he doesn’t praise capitalism, not even in its most moderate and positive form, nor stress the value of the free market. Other aspects of the free economy, such as interest, international commerce, the financial markets, speculation, etc., are viewed by the Pontiff with a certain caution and reserve. He also employs terminology that an economist might find unsettling, and seems to want to introduce elements of what he calls the *gift economy* into the market economy. The *gift economy* is a situation typical of so-called “primitive” civilizations (made up primarily of farmers and hunters), with a social structure in which goods and services are produced and given without an explicit accord of *do ut des*. The gift economy is not a market economy. The Pope, of course, is not at all proposing a return to economic forms prior to the modern era; rather he is inviting us to “broaden our outlook” and to introduce a new logic into the economy: the logic of gratuitousness and gift. This invitation merits a deeper explanation.

III. Fundamental goals proposed by the Encyclical *Caritas in Veritate*

1. *The epistemological question of economics*

In *Caritas in Veritate* Pope Benedict XVI speaks of “the excessive segmenta-

culturali. L’enciclica Centesimus Annus-1.V.1991,” in Graziano Borghonovo and Arturo Cattaneo (eds.), *Giovanni Paolo Teologo. Nel segno delle encicliche*, Mondadori, Milan (2003), 142 and ff.

16. John Paul II, Encyclical *Centesimus Annus*, no. 34: “It would appear that, on the level of individual nations and of international relations, the free market is the most efficient instrument for utilizing resources and effectively responding to needs.”

17. Cf. *ibid.*, no. 42.

18. Cf. *Caritas in Veritate*, no. 24 and no. 41.

tion of knowledge”¹⁹ in fields that have reached a high degree of specialization, paying as a price a loss of the human meaning of the object studied. Confronted with this situation, the Pope calls for “a further and deeper reflection on the meaning of the economy and its goals.”²⁰

The problem to which the Pope refers is parallel to the epistemological problem in the relationship between faith and the natural sciences. If a scientist consciously and *a priori* excludes all that is not material, the method he employs can never reach anything that transcends the material world. J. B. S. Haldane, a biologist of the past century, wrote: “My practice as a scientist is atheistic. That is to say, when I set up an experiment I assume that no god, angel, or devil is going to interfere with its course.”²¹ We could expand his words: neither persons, nor sentiments, nor ethical reflections, will be allowed to interfere in the course of his experimentation. If a scientist works within the limits of this empirical method and deliberately remains within those limits, then the method might be justified. But if one seeks to demonstrate the non-existence of something that the very choice of the method excludes, one falls into an obvious vicious circle.

This is particularly important when dealing with human actions, because in this case the voice of conscience makes itself heard. Economic activity is a free human activity, that is, an action that is judged by our conscience and guided by our convictions and by our virtues or vices. Moral principles are not bothersome limitations opposed to economic benefits: what is ethically bad is also an error in terms of the economy; and vice versa; what is an error in regard to the economy is also such from the ethical point of view because it would constitute mistaken human behavior. As Benedict XVI wrote: “the conviction that the economy must be autonomous, that it must be shielded from ‘influences’ of a moral character, has led man to abuse the economic process in a thoroughly destructive way. In the long term, these convictions have led to economic, social and political systems that trample upon personal and social freedom, and are therefore unable to deliver the justice that they promise.”²²

When economics, both theoretically as well as practically, opens itself to a broader concept of reason—as Benedict XVI hopes—then it will discover new solutions for attaining integral human development.²³

The Pope’s concern here connects with a current in the social sciences that was born in Italy, but that is not yet sufficiently well known outside of that country. We are speaking of the so-called school of “civil economy.”²⁴ Although a detailed explanation is beyond the scope of this study, this school stems from certain historical facts. For centuries there existed what one might call a “Catholic antagonism” towards economics, finance, money, etc., that is, towards the fundamental factors of the modern economic system.

19. *Caritas in Veritate*, no. 31.

20. *Ibid.*, no. 32.

21. J.B.S. Haldane, *Faith and Fact*, Watts & Co, London (1934), vi.

22. *Caritas in Veritate*, no. 34.

23. Cf. *Caritas in Veritate*, no. 31.

24. Cf. for a general survey: Luigino Bruni and Stefano Zamagni, *Economia civile. Efficienza, equità,*

This “antagonism” has its origin in four sources: Aristotle, who considered money as merely a medium of exchange, and therefore rejected the view that money could be used to increase money, as a form of “unnatural enrichment” (*nummus non facit nummum*: “money does not produce money”);²⁵ the Biblical prohibition of usury, which was extended to include any type of interest, an essential element of the modern economy;²⁶ a good number of the Fathers of the Church;²⁷ and some statements of the Magisterium, in particular the canons of ecclesiastical law. Moreover, in his Encyclical *Vix Pervenit* (1745), Benedict XIV severely condemned the collection of interest, but at the same time permitted the establishment of parallel contracts that *de facto* made possible the payment of *lucrum cessans*.²⁸

On the other hand, the great majority of the Fathers of the Church maintained a truly balanced position regarding commerce and the effort to obtain a reasonable standard of living. Their viewpoint could be summed up in the following way: the problem lies not in the possession of wealth, but in how it is used. A careful reading of the Patristic sources reveals that the Fathers of the Church did not develop an economic doctrine but rather a social doctrine.²⁹ They raised their voices in defense of the poor against exploitation by the rich; they condemned luxury and profligacy as well as laziness and carelessness in work.³⁰ But above all they stressed Christian charity. They inspired the building of hospitals, hospices for travelers and pilgrims, soup kitchens for the poor, etc. In addition, they also took for granted freedom in the exercise of commerce and in contracts.

Later, especially in the Franciscan school of the 14th century and the Salamancan school of the 16th century, the foundations were laid not only for a new understanding in the Church of economic activity, but also for the beginning

felicità pubblica, Il Mulino, Bologna (2004); Bruni and Zamagni (eds.), *Dizionario di economia civile*, Città Nuova, Rome (2009).

25. See Aristotle, *Politics*, I (A), 1258 b, 2-8: “The most hated sort (of wealth getting) and with the greatest reason, is usury, which makes a gain out of money itself and not from the natural object of it. For money was intended to be used in exchange but not to increase at interest. . . . Wherefore of all modes of getting wealth, this is the most unnatural.” On this topic: Bertram Schefold, “Platone (428/427-348/347) e Aristotele (348-322)” in Joachim Starbatty (ed.), *Klassiker des ökonomischen Denkens. Von Platon bis John Maynard Keynes*, Nikol, Hamburg (2008), 19-55, 39.

26. The principal texts of the Old Testament are: Ex 22:24; Lev 25:35-37; Deut 23:20-21; cf. also Ps 15:5; Prov 28:8; Ezek 18:8; 13:17; 22:12. In the New Testament there is Lk 6:35. For an exegetical commentary see: Angelo Tosato, “Vangelo e ricchezza.” *Nuove prospettive esegetiche*, Dario Antiseri, Francesco d’Agostino and Angelo Petroni (coords.), Rubbettino, Soveria Mannelli (2002) 272ff.

27. Cf. for example Lactantius, *Institutiones divinae* 6,18; St. Ambrose, Tb 7; St. Leo the Great, *Sermo* 17,3. Citations are taken from Restituto Sierra Bravo (ed.), *Diccionario Social de los Padres de la Iglesia*, Edibesa, Madrid (s.d.), 376ff. (“usury”).

28. Cf. Denzinger-Hünermann, *Enchiridion Symbolorum*, EDB, Bologna (2003) nos. 2546-2550.

29. Cf. Ernst Dassmann, *Kirchengeschichte I. Ausbreitung, Leben und Lehre der Kirche in den ersten drei Jahrhunderten*, Kohlhammer, Stuttgart/Berlin/Köln (1991), 239-250; Idem, *Kirchengeschichte II/2. Theologie und innerkirchliches Leben bis zum Ausgang der Spätantike*, Kohlhammer, Stuttgart/Berlin/Köln (1999), 225-233. See also: Oreste Bazzichi, *Dall’usura al giusto profitto. L’etica economica della Scuola francescana*, Effatà editrice, Torino (2008), 32 and ff.; Restituto Sierra Bravo, op. cit. For a description of the historical situation in general see Traudel Heinze, *Konstantin der Große und das konstantinische Zeitalter in den Urteilen und Wegen der deutsch-italienischen Forschungsdiskussion*, Herbert Utz Verlag, Munich (2005), 313ff.

30. Cf. Alfredo Luciani, *Etica Economia Finanza globale*, LEV, Vatican City (2008), 57.

of the modern science of economics.³¹ The concept of “capital,”³² for example, was coined and developed by monks who had themselves taken a vow of poverty: money was converted, thanks to man’s work, into caput that is, into a source of benefits. It was the Franciscans who opened for the first time a chain of more than 150 *Montes de Piedad*. Bearing some similarities to modern-day “pawnshops,” these were places where one could take out a loan at very low interest against some type of bond or surety. This practice was established all over Italy to provide credit accessible to craftsmen and poor farmers in moments of crisis (microfinance). These friars were in constant contact with the poor, who frequently ended up the victims of usurers. The latter paradoxically, and precisely because of the canonical prohibition against giving loans with interest, fell outside all regulation, and therefore at times demanded exorbitant interest. At the same time the poor often were forced into a much greater indigence because their work instruments and their livestock were impounded by the usurers. This situation was reversed thanks to the “Montes de Piedad,” for which the Franciscan theologians, overcoming great difficulties, had to create the necessary theoretical framework.³³

This phenomenon occurred wherever the “paleo-capitalistic” tendency was strongest: that is, in the city-states of the first Renaissance (14th and 15th centuries), and later, in the period of the Enlightenment, in the chairs at the Universities of Naples and Milan.

This cultural movement came to be known as “civil economy.” From this school of thought stem the concepts in the Pope’s social encyclical that we might find surprising in the context of economic theory: gratuitousness, the logic of gift, fraternity, reciprocity, relationality.

2. *The principal of gratuitousness, gift, and fraternity*

Benedict XVI seeks in *Caritas in Veritate* “to make room for the principle of gratuitousness as an expression of fraternity.”³⁴ This “principle of gratuitousness” does not exclude justice nor is it extrinsic to it, and this is true also of the “logic of gift.” “While in the past it was possible to argue that justice had to come first and gratuitousness could follow afterwards, as a complement, today it is clear that without gratuitousness, there can be no justice in the first place.”³⁵

31. For an overview of the historical background, see Oreste Bazzichi, *Dall’usura al giusto profitto. L’etica economica della Scuola francescana*, Effatà, Torino (2008).

32. Cf. For the history of the term, see Marie-Elisabeth Hilger, “Kapital, Kapitalist, Kapitalismus,” in: Otto Brunner/Werner Conze/Reinhard Koselleck (eds.), *Geschichtliche Grundbegriffe. Historisches Lexikon zur politisch-sozialen Sprache in Deutschland, Studienausgabe*, Vol. 3, Klett-Cotta, Stuttgart (2004), 399-428.

33. The Bull “*Inter multiplices*” (May 4, 1515) promulgated by Leo X recognized the “Montes de Piedad” as charitable institutions, with an interest rate that had to be reasonable (i.e. covering the running costs). The prohibition of requiring interest remained in force even after the publication of this Bull, unless the interest of the loan was to be used for the salaries of the employees and to cover the other costs of the “Montes de Piedad,” and not simply to pay for the loan as such. Cf. Denzinger-Hünermann, *Enchiridion Symbolorum*, EDB, Bologna (2003) nos. 1442-1444.

34. *Caritas in Veritate*, no. 34.

35. *Ibid.*, no. 38.

In the school of thought known as “civil economy,” “gift” is not the same thing as a “present.” Rather, it flows from the fact that commerce is always an exchange between persons of merchandise or other material goods. This exchange is possible only in the context of a personal relationship, which may be of various kinds (human or inhuman, friendly or exploitive, loyal or fraudulent, etc.). To ensure that this relationship is a human one, first of all there needs to be a “pre-gift” (*Vorgabe*), that is to say, the recognition that the other is our “neighbor,” with intrinsic dignity. One needs to have confidence in the other person and put oneself in their shoes. This “pre-gift” confers a specific meaning on the commercial relationship: the relationship will be human or inhuman, exploitive or loyal, etc., depending on the way in which one views the commercial partner or neighbor to whom the commercial activity is directed. The “pre-gift” is, at the same time, a “gift of meaning” (*Sinngebung*). Where this fullness of meaning is lacking, the relationship becomes inhuman. Therefore the gift in the context of a spirit of gratuitousness is a sign of how developed a society really is.³⁶

It is difficult to define what gratuitousness is. Living together in a human way is impossible without gratuitousness. Without it there is no truly human encounter with one’s neighbor. Without gratuitousness there is no trust, an indispensable element for the stability of the market and of society.

The concept of “gratuitousness” should not be understood as “giving things away for free.” Gratuitousness is not “distribution at a zero price,” but rather “unpayability,” giving “something that has no price.” It is what Kant tried to express with his concept of “human dignity:” Man has dignity, but he does not have a price. Human dignity is the basis and the source of all human rights. The human person is called to live in a society, but is not dissolved into it. Each person is unique, unrepeatable, indispensable, incommensurable, incommunicable. The person is an end in itself, never a means. “Gratuitous” behavior in the economy consists, therefore, in having truly human relationships, which are not just an instrument for purposes of benefit or efficiency.³⁷

The ancient and medieval *communitas* was “semi- totalitarian,” in the sense that one could not conceive of an ethical life outside of the polis, and in the sense that the community was the whole, while the person was just a part of it. The modern age and the overcoming of this outlook in which the community prevails over the individual has led to the birth of the individual with his or her rights, even against the community. A new foundation for life in common was therefore needed, since the concept of the totality of the community had been lost. This was found in the market. In economic exchange, it does not matter, in principal, what one’s religion, culture, or ethnicity, etc. might be. Rather the system of prices, as a mediator of relationships, sterilized the elements that might give rise to clashes: everyone who is able to pay or exchange goods or services is included in the market system.

36. Cf. Pierpaolo Donati, under the heading of “*Dono*” [“Gift”], in Bruni and Zamagni (eds.), op. cit., 279-291.

37. Cf. Luigini Bruni under the headings “*Fraternità*” and “*Gratuità*” in: Bruni and Zamagni (eds.), op. cit., 439-444 and 484-488; also from a juridical point of view: Afredo Galasso and Silvio Mazzarese (eds.), *Il principio di gratuità*, Dott. A. Giuffrè Editore, Milano (2008).

The solution of establishing a market, however, results in two antithetical effects: one of inclusion or union, and a second that produces loneliness and unhappiness, since the price that is demanded is the abandonment of true fraternity. True fraternity is restricted to the private sphere. Universal fraternity is too dangerous for the public sphere, because—by being a manifestation of *agapé* (disinterested love)—it creates a crisis for the apparent equilibrium of the market economy.³⁸ “The great deception of the humanism of the market was thinking that one could preserve something authentically human even while eliminating the relationship of fraternity, with all its tragic weight of sorrow and suffering.”³⁹

The great challenge of the “civil economy” is to once again introduce fraternity into the public sphere and into the market. It is not the case that a free market economy is intrinsically opposed to fraternity, or that our market economy has to be replaced with a non-market economy. Rather we need to discover and strengthen many gratuitous elements that already exist: for example, blood and organ donations, social volunteer networks, open source software, and, above all, the gratuitous services that take place within the sphere of the family. All these activities help to make our life and society more human.⁴⁰

3. Reciprocity and relationality

Gratuitousness is connected with another aspect the Pope wishes to highlight as important for the economy: that of reciprocity and relation. “As a spiritual being, the human creature is defined through interpersonal relations. The more authentically he or she lives these relations, the more his or her own personal identity matures. It is not by isolation that man establishes his worth, but by placing himself in relation with others and with God.”⁴¹

Reciprocity is the internal law of the web of relationships that governs a society. There exists a “negative” reciprocity (conflicts, wars, revenge, etc.),⁴² but there is also a “positive” and constructive reciprocity that makes possible collaboration and social development (contracts, the market, friendship, love, etc.). Positive reciprocity represents a fundamental act of recognition of the other as my equal.⁴³

Benedict XVI studies four aspects of economic life in which the principal of reciprocity and relation is effective: the market, the business enterprise, managerial activity, and political authority. Applied to the market, reciprocity means considering the market as a meeting between persons who enter into a mutual relationship: “In a climate of mutual trust, the market is the economic institution that permits encounter between persons, inasmuch as they are economic subjects who make use of contracts to regulate their relations as they

38. Luigino Bruni, under the heading “*Communitas*” in Bruni and Zamagni (eds.), op. cit., 202-208.

39. Luigino Bruni, under the heading “*Fraternità*” in Bruni and Zamagni (eds.), op. cit., 442.

40. Cf. Maria Pia Chirinos, *Claves para una antropología del trabajo*, EUNSA, Pamplona (2006). In Italian: *Un’antropologia del lavoro: il “domestico” come categoria*, EDUSC, Rome (2005).

41. *Caritas in Veritate*, no. 53.

42. Cf. Luigino Bruni, under the heading “*Reciprocità*”, in Bruni and Zamagni (eds.), op. cit., 652-660.

43. Martin Rhonheimer, *La perspectiva de la moral. Fundamentos de la Ética Filosófica*, Rialp, Madrid (2000), 289ff. where he carefully analyzes this question.

exchange goods and services of equivalent value between them, in order to satisfy their needs and desires.”⁴⁴

The market “does not exist in the pure state,” the Pope says. “It is shaped by the cultural configurations which define it and give it direction. Economy and finance, as instruments, can be used badly when those at the helm are motivated by purely selfish ends. Instruments that are good in themselves can thereby be transformed into harmful ones. But it is man’s darkened reason that produces these consequences, not the instrument per se. Therefore it is not the instrument that must be called to account, but individuals, their moral conscience and their personal and social responsibility.”⁴⁵

The Church’s social doctrine “holds that authentically human social relationships of friendship, solidarity and reciprocity can also be conducted within economic activity, and not only outside it or ‘after’ it. The economic sphere is neither ethically neutral, nor inherently inhuman and opposed to society. It is part and parcel of human activity and precisely because it is human, it must be structured and governed in an ethical manner.”⁴⁶

IV. *Caritas in Veritate* and St. Josemaría

Since many of the studies in this publication are concerned with the message of St. Josemaría and its implications in various areas of human life, it seems opportune to consider some points of his preaching and pastoral work in relation to the teachings found in *Caritas in Veritate*.

In fact, many of the questions and proposals set forth in *Caritas in Veritate* are central to the teachings of St. Josemaría.⁴⁷ This is true, first of all, with respect to the central theme of his message: the sanctification of work in the middle of the world.⁴⁸ This, in turn, leads us back to our opening question about the influence of religion in the world and society. One recent author—in dialogue with the thesis of Max Weber—argues that St. Josemaría has inserted into the Catholic tradition the intuition of the Protestant reformers about the positive value of ordinary life.⁴⁹ Luther introduced into the German language the term *Beruf* (calling) and

44. *Caritas in Veritate*, no. 35. For a preliminary look at the different concepts of “market” from an historical perspective, see Kurt Röttgers, under the heading “Markt,” in Joachim Ritter and Karlfried Gründer (eds.) *Historisches Wörterbuch der Philosophie*, Vol. 5, Schwabe & Co. AG, Basel/Stuttgart (1980), 753-758

45. *Caritas in Veritate*, no. 36.

46. *Ibid.*, no. 36.

47. This doesn’t mean to imply that St. Josemaría’s teachings directly influenced the content of *Caritas in Veritate*. On the other hand, the *economía di comunione*, a Christian model of the economy promoted by Chiara Lubich, the founder of the Focolari Movement, did have a direct influence on the Encyclical. Cf. Giuseppe Argiolas, under the heading “*Economía di Comunione*,” in Bruni and Zamagni (eds.), *op. cit.*, 332-245.

48. Cf. Amadeo de Fuenmayor, Valentín Gómez-Iglesias and José Luis Illanes, *The Canonical Path of Opus Dei: The History and Defense of a Charism*, Scepter Publishers, New York (1994), in particular 34-41.

49. Cf. Martin Rhonheimer, “Affirming the World and Christian Holiness,” in *Changing the World: The Timeliness of Opus Dei*, Scepter, New York (2009). pp. 30-60.

reserved it for professional work.⁵⁰ For him, the vocation (*Berufung*) proper to man is work, not the consecrated life.

Josemaría Escrivá, without restricting the concept of vocation to this aspect, used the expressions “professional vocation” and “human vocation” to signify that all honorable human circumstances and occupations can be a true divine vocation, if they are seen and lived in the light of faith. Strictly speaking, “we cannot say that there are things—good, noble or indifferent—which are exclusively worldly. This cannot be after the Word of God has lived among the children of men, felt hunger and thirst, worked with his hands, experienced friendship and obedience and suffering and death.”⁵¹

No honest human reality is excluded from the possibility of being sanctified and becoming a path towards sanctity. And this includes the modern economic and financial system, a position Escrivá was forced to expressly defend for the members of Opus Dei. The Code of Canon Law prohibited and prohibits priests and religious from taking part in financial and commercial activities,⁵² although ordinary Christians have always been free to work in those fields. Nevertheless, a decree in 1950 prohibited the lay members of secular institutes from dedicating themselves to financial activities. In those circumstances, and to remove any possible doubt about the lay condition of the faithful of Opus Dei, the founder asked the Holy See for an express declaration that they could also work in “*commercio vel rebus nummariis*.”⁵³

We can’t consider here all of St. Josemaría’s teachings regarding the sanctification of work.⁵⁴ But I want to look briefly at a few aspects that are also found in *Caritas in Veritate*.

St. Josemaría stressed, above all, the freedom the laity possess and tried never to interfere in what concerns their own freedom and responsibility. The founder of Opus Dei realized that, as a priest, he shouldn’t seek to offer specific suggestions in this area. “I know that it is not proper for me to discuss secular and current topics which belong to the temporal and civil sphere—subjects which our Lord has left to the free and calm discussion of men. I also know that a priest’s lips must avoid all human, partisan controversy. He has to open them only to lead souls to God, to his saving doctrine and to the sacraments which Jesus Christ established.”⁵⁵ However, we do find in his teachings some guiding principles that lend support to ideas in the Encyclical. Expressing these in the terminology used by the Encyclical may even help facilitate the grasp of certain concepts that otherwise might be difficult to understand.

For Josemaría Escrivá, “relationality” is a fundamental concept. There are many passages in his works that stress the need to foster unity with others. This

50. Cf. for more details, Max Weber, *The Protestant Ethic and the Spirit of Capitalism*, passim.

51. St. Josemaría, *Christ Is Passing By*, no. 112.

52. Canons 286 and 672 of CIC 1983.

53. For more data see Fuenmayor, Gómez-Iglesias and Illanes, op. cit., 260 and ff.

54. Cf. José Luis Illanes, *The Sanctification of Work*, Scepter, New York 2003.

55. Cf. *Christ Is Passing By*, no. 184.

is particularly so for work, which by its very nature is a service to others: “And so, as the motto of your work, I can give you this one: If you want to be useful, serve. . . . But human service and technique, our knowledge of our job, should have a feature which was basic to St Joseph’s work and should be so for every Christian: the spirit of service, the desire to contribute to the well-being of other people.”⁵⁶

We also find throughout his writings a true appreciation for what the Encyclical terms “gratuitousness.” For example, in this imaginative reconstruction of the work carried out by St. Joseph: “Sometimes, in the case of people poorer than himself, Joseph would charge only a little—just enough for his customer to feel that he had paid. But normally he would charge a reasonable amount—not too much nor too little. He would demand what was justly owed him, for faithfulness to God cannot mean giving up rights which in fact are duties. St Joseph had to be properly paid, since this was his means of supporting the family which God had entrusted to him.”⁵⁷ St. Josemaría also insisted, in words reminiscent of John Wesley, the founder of Methodism:⁵⁸ “A Christian cannot be content with a job that only allows him to earn enough for himself and his family. He will be big-hearted enough to give others a helping hand both out of charity and as a matter of justice.” And he goes on to ask: “How much does it cost you—in financial terms as well—to be Christians?”⁵⁹

The effort to sanctify one’s work (and therefore to sanctify the economy) must also include a concern for social justice and human development. “It is easy to understand the impatience, anxiety and uneasiness of people whose naturally Christian soul stimulates them to fight the personal and social injustice which the human heart can create. . . . The good things of the earth, monopolized by a handful of people; the culture of the world, confined to cliques. And, on the outside, hunger for bread and education. Human lives—holy, because they come from God—treated as mere things, as statistics. I understand and share this impatience. It stirs me to look at Christ, who is continually inviting us to put his new commandment of love into practice.”⁶⁰

And finally, in reference to a central concern of this article, namely, the relationship between Christian tradition and the modern world, the following words from Furrow are quite significant:

“Since you want to acquire a Catholic or universal mentality, here are some characteristics you should aim at:

—a breadth of vision and a deepening insight into the things that remain alive and unchanged in Catholic orthodoxy;

56. *Ibid.*, nos. 50-51.

57. *Ibid.*, no. 52.

58. Cited by Martin Rhonheimer, “*Bejahung der Welt und christliche Heiligkeit*”, in *Verwandlung der Welt. Zur Aktualität des Opus Dei*, Adamas, Köln (2006), 62: “Earn what you can, save what you can, give what you can.” English edition, *Changing the World*, op. cit., p. 42.

59. St. Josemaría, *Friends of God*, no. 126.

60. *Christ Is Passing By*, no. 1111. St. Josemaría’s ardent concern here inspired the creation of a wide range of social, educational, and developmental initiatives, cf. Bernardo Villegas, “Development of

—a proper and healthy desire, which should never be frivolous, to present anew the standard teachings of traditional thought in philosophy and the interpretation of history;
 —a careful awareness of trends in science and contemporary thought;
 —and a positive and open attitude towards the current changes in society and in ways of living.”⁶¹

V. Conclusion

Pope Benedict XVI, in his Encyclical *Caritas in Veritate*, has expanded and developed the content of his predecessor’s *Centesimus Annus*. He does not eliminate the possibility of reconciling the faith with modernity, but he calls on modernity to take a step forward. The Pope seeks to free reason from the prejudices and narrow methods of the Enlightenment, in order to make room for the deepest human realities. But what does all this mean in connection with the question we raised at the outset? Has the Church returned to its roots in the process of reconciling itself with the modern economy?

To evaluate the historical continuity of the social doctrine of the Church, we would have to go back to a period much earlier than 1789, even to the time of the Fathers of the Church. In this article, this historical review has only been possible in a very schematic way. The Fathers of the Church, and with them Christian tradition, stressed the centrality of the person and his or her freedom and dignity, also in regard to economic and commercial concerns. At the same time they placed clear limits to the conformity of Christian conduct in the public sphere with the dominant spirit of the times (the *Zeitgeist*). Thus they gave clear indications, relevant also for today’s economic system, on what a “purification of reason by the faith” might mean. The Encyclical *Caritas in Veritate* continues the discussion starting from this point.

Societies” in *Romana*, no. 47, July-December 2008, 360-371.

61. St. Josemaría, *Furrow*, no. 428.