LIBERATION AND THEOLOGY

by Fernando Ocáriz (*)

I. BASIS FOR A THOLOGICAL REFLECTION ON LIBERATION

The Instruction *Libertatis nuntius* begins by saying that "the Gospel of Jesus Christ is a message of freedom and a force for liberation."(1) Before objecting to the serious errors contained in some *theologies of liberation,* the same Instruction declares that this intervention of the Holy See "should not at all serve as an excuse for those who maintain an attitude of neutrality and indifference in the face of the tragic and pressing problems of human misery and injustice."(2)

The need to reject some theoretical and practical approaches conductive to a doctrine and praxis which are a subversion of Christianity does not imply a denial of the legitimacy of an authentic theology of liberation. If the Gospel is –as it really is– a message of freedom and a force for liberation, then the possibility of a theological reflection on such freedom and on such liberation should obviously exist.

The notion that twenty centuries of Christianity has achieved nothing in this field is historically false. Much has, in fact, been done both in the realm of doctrine and of practice, as well as in the lives of countless Christians who –at times even heroically– have fulfilled the demands of justice and charity by carrying out far-reaching activities of human promotion. It is, however, undeniable that much more has still to be done, and that a legitimate theology of liberation –by whatever name it goes– can render a valuable service to the Church.

The first question

To begin with, a valid theology of liberation must start from premises that make it an authentic theology and that lead to an authentic Christian liberation. Naturally, its most basic premises must be the usual ones, common to all genuine theological work. They require that priority be given to the task of searching –in Scripture, Tradition and the Magisterium of the Church– *whatever God may have revealed* concerning the various problems under consideration. Then, through rational effort and contemplation, we can try to gain a deeper understanding of that revelation, which is accepted by faith, in order to draw practical consequences for human life.

The first question that a theology of liberation must propose to itself *is not* how to find an effective praxis of liberation; the first question must address the problem of defining the freedom announced in the Christian message. Therefore, the mission of the theology of liberation will be, before anything else, a *search for truth,* to be able to contribute to the effective liberation of man *in practice.* There are two reasons for this. One of them is pragmatic, in the sense that there is nothing more effective than a sound theory. The other is intrinsic: only from truth as a starting point will it be possible to elaborate a truly effective praxis of Christian liberation: *the truth shall make you free.*(3)

This primacy of the search for truth is not at all *intellectualism,* since Christ's truth has in itself the power to become life, since it is the Word of God, and *He who is the Truth is also the Life.*(4) The alleged contraposition between *orthodoxia* and *orthopraxis* is really meaningless.(5) There is no possible orthopraxis that is not based on orthodoxy.

The speculative inquiry into the truth revealed by God requires an attitude of philosophic and scientific *realism,* in order to guarantee the harmony between reason and faith. This attitude, among other things, avoids falling into the error of giving more importance to *doing* than to *being,* to the *historical fact* than to *what is permanent in history.* This is the error of the liberation theologies that have adopted a Marxist concept of history, within which it is no longer possible to recognize that –in the words of the Vatican Council II– "beneath all that changes there is much that is unchanging, much that has its ultimate foundation in Christ, who is the same yesterday, and today, and forever (cf. Heb. 13, 8)."(6)

Certainly, from Adam to the Apostles, Revelation became a reality in history; even more, Revelation was made through history. So it can be said that history itself was Revelation: though not just history, but history plus the divine Word which has revealed the meaning and the truth (therefore the *being*) that is made known to us through history. Thus contemporary history, with its grave and urgent social, economic and political problems, is not a key to the interpretation of the Christian message. On the contrary, it is the "unchanging" truth that has

(*) Fernando Ocáriz, SB, ThD, is professor of Theology in the Rome Section of the Faculty of Theology of the University of Navarre.

to be used as a key for a Christian interpretation of our present history, and the basis on which to build a praxis that can effectively contribute to the solution of those problems.

This "unchanging" truth at the basis of any valid theology of liberation was brought into focus by John Paul II in his address at Puebla, when he referred to it as "three pillars: the truth about Jesus Christ, the truth about the Church, and the truth about mankind."(7) All three pillars have some common aspects that are important for the theology of liberation: their divine and human dimension, and their eschatological dimension.

The divine-and-human dimension of liberation

Each and every Christian reality, whether in the Church as a whole or in each individual person, somehow reflects the mystery of Christ, God's incarnation. Thus any meaningful attempt at gaining a deeper theological understanding of freedom and of its corresponding Christian liberation must take into account the essential divine and human dimension of that freedom and of that liberation; otherwise it will never be able to grasp what is *specifically Christian* in them.

The divine and human character of the freedom *wherewith Christ has made us free* (8) implies that, in man's liberation, there are two elements: one of which is divine (i.e., supernatural or divine by participation), and another purely human (or natural).

The *divine* (supernatural) element is the *liberation from sin* (9): not a mere lack of imputation of guilt, but a positive regeneration through grace which makes man God-like, partaker of the divine nature.(10) The forgiveness of sins is a true liberation, since the state of sin is perceived as the worst state of slavery for man, according to the words of Christ: *everyone who commits sin is a slave of sin.*(11) Man becomes a slave because sin chains him to what is finite, preventing him from rising toward the Infinite.

The *human* element of liberation –aside from the restoration of the internal freedom through grace– could be said to refer to the liberation from all those things which, in various ways, are the cause of suffering for humans: illness and death, ignorance and hunger, racial discrimination and economic oppression, etc. The theological reflection on Christian liberation cannot ignore those realities. In actual practice, "a man or a society that does not react to suffering and injustice and makes no effort to alleviate them is still distant from the love of Christ's heart. While Christians enjoy the fullest freedom in finding and applying various solutions to these problems, they should be united in having one and the same desire to serve mankind. Otherwise their Christianity will not be the words and life of Jesus; it will be a fraud, a deception of God and man."(12)

In Christ, his divinity and his humanity are united *without confusion,* but also *without separation.* Similarly, any theological reflection on the above two elements of liberation, if carried out in the light of the mystery of Jesus Christ, should consider that there is no confusion between the liberation from sin and the human liberation –nor should there be any separation. Let us consider this further.

First, it should be obvious that there is no confusion: liberation from sin alone does not, by itself, eliminate suffering; nor does elimination of suffering necessarily entail liberation from sin. But not being separated is less evident: the two elements seem to occur, at times, as separate things: someone can be in a state of grace and yet be suffering from hunger or injustice; or he can be enjoying a comfortable life and be at the same time a slave of sin. What is then the meaning of the *non-separation*? In order to answer this question, we must consider the other dimension of the Christian mystery that was mentioned before –its eschatological dimension. But there is one more point that should be brought up first, and that is the *radical* character of the supernatural element, in contrast with the *consequential* character of the natural element of Christian liberation. (Here, too, we can see the similarity with the mystery of Jesus Christ: the divine nature in Jesus is the *cause* of his human nature: God creates and assumes Christ's humanity, whereas it cannot be said that his humanity has assumed the divinity unto itself).

Looking at things from a negative point of view, so to speak, we know through Revelation that *all* the evils of the world are the consequence of original sin, and our own experience shows that some of those evils are, more immediately, the consequence of the personal sins of men.(13) On the positive side, we must say that, whereas it may be possible to eliminate some of the particular evils even without liberation from sin, yet *the full liberation of man is impossible without liberation from sin.* In other words, any attempt to build a world and a society more worthy of man, and endowed with structures fully in accord with the demands of justice, is certainly doomed to failure, unless it goes hand in hand with an effort to bring about the supernatural regeneration of men. Paul VI put it this way: "There is no new mankind if there are not first of all new men renewed by baptism and by lives lived according to the gospel."(14)

The eschatological dimension of liberation

Beloved –writes St. John– *now we are the children of God, and it has not yet been manifested what we shall be.*(15) Christian existence between the first and second coming of Christ is essentially marked by the *eschatological tension* due to the *here and now* versus the *not yet.* Hence Christian liberation must be considered as a reality existing *here and now,* and, at the same time, as something which is *not yet* fully manifested.

The supernatural element of Christian liberation is a reality *here and now,* because liberation from sin is real, and, together with it, man's divine filiation, guaranteed and somehow made visible in the sacramentality of the Church. Nevertheless, this liberation from sin is also something *not yet* fully achieved: on the one hand, because it is not definitive in this life for each man, since he may fall again into the slavery of sin and since some of the consequences of sin still remain; on the other hand –and above all– because the full freedom of the children of God is only attainable after death, in Glory, where *we shall be like to him, for we shall see him just as he is.*(16)

What we have been calling the human or natural element of Christian liberation is also necessarily subject to this eschatological tension. The *not yet* aspect of this element is evident not only as a matter of fact, but even as an essential characteristic. This is so because man's full liberation from all sufferings and from death itself cannot take place within the framework of history; only at the end of time will there be *a new heaven and a new earth* (17) where God himself *will wipe away every tear from their eyes; and death shall be no more; neither shall there be mourning, nor crying, nor pain any more, for the former things shall have passed away.*(18) Christian hope does not envision a future within history, but eternal life in Glory after death and, finally, the resurrection and glorification of the body, along with some manner of glorification of the material universe.

Nevertheless, the eschatological dimension implies that this natural element of liberation is a reality *here and now,* also because –as was pointed out before– this element, though different from the supernatural one, is in a certain sense *inseparable* from it. Let us see the meaning of this *sense.*

We will consider an extreme case that seems to contradict what we are saying: can it be stated that liberation from death is a reality *here and now*? The Christian answer is, of course, in the affirmative, as witnessed by the Epistle to the Hebrews where it says that Christ came to *deliver them who through-out their life were kept in servitude by the fear of death.*(19) Christ has, *here and now,* delivered us from death in so far as he, by throwing open the gates of heaven, has effectively freed us from the fear of death. Is not this a true and profound liberation? It certainly is, and a radical one too. Although death may not have yet disappeared from this world, still, for those who receive the liberation wrought by Jesus Christ, that death loses its enslaving power, to become a means of salvation –the transit to the happiness of heaven.(20)

The same should be said in connection with the liberation from suffering, which has already been achieved *here and now.* Christ has *freed us from the fear of suffering* precisely because he gave it a new meaning and a new value: suffering now means sharing in his redeeming Cross. From the Christian point of view, suffering is not only to be patiently accepted, but it can –it must– become a source of salvation if united to the Cross of Christ.(21) All this is not a mere "pious thought" for those who suffer, but an essential element of Christianity.

II. HUMAN LIBERATION: A DUTY FOR CHRISTIANS

Within the vast field suggested by this title, we intend to deal with a specific issue which requires urgent theological clarification for the Church and for the individual Christian. We are referring to the so-called *preferential option for the poor,* a subject that was reaffirmed at Medellin, then at the Conference of Puebla, and later taken up by the Magisterium of the Pope (22) –although the concept is really as old as Christianity itself. Also, in connection with this point, we shall touch upon several other important subjects.

The Preferential Option for the Poor

In a homily preached in Santo Domingo on October 11, 1984, John Paul II mentioned some *fundamental points of reference* for the study and the practice of this option for the poor. The text is as follows:

"The Church must be completely faithful to her Lord, by putting that option into practice and offering her generous contribution to the work of "social liberation" of the dispossessed multitudes, in order to attain a justice for all that will correspond to their dignity as men and as children of God.

"But that important and urgent task must be carried out in an attitude of fidelity to the Gospel, which forbids recourse to methods of hate and violence;

–it must be carried out by maintaining a preferential option for the poor, that will not be *exclusive* nor *excluding,* as I myself have said on different occasions, but which will be open to all who want to leave sin behind and be converted in their hearts;

–it must be carried out without viewing the poor as a class or in a class struggle, or as a Church separated from communion with and obedience to the shepherds appointed by Christ;

–it must be carried out by looking at man in his earthly and eternal vocation;

–it must be carried out without transformation of society exposing man to the risk of falling under systems *that deprive him of his freedom* and submit him to programs of atheism, like practical materialism which despoil him of his internal and transcendent riches;

–it must be carried out in the knowledge that the primary liberation that man must seek is liberation from sin, from the moral evil that finds shelter in his heart and which is the cause of 'social sin' and of oppressive structures."(23)

The last three of the points mentioned by the Pope have already been discussed earlier in this article. They deal with the primary and radical character of the liberation from sin, the preeminence of the person over structures, and the supernatural, transcendent and eschatological dimension of Christian liberation. All of this implies –as was pointed out before– that a valid *praxis* of liberation cannot consider only the economic, social and political aspects of the problem, but must seek first the *conversion of the hearts,* through the preaching of the Word of God and through the sacraments.

On these premises, it is easily understood that the preferential option for the poor cannot be *exclusive* nor *excluding.* Christ came to this world to call and to save sinners.(24) Thus, when the suffering of many is due to the injustice of the few, the preferential option for the poor must lead to work towards the conversion of those few. Indeed, a theological reflection on this point cannot overlook the fact that, in Sacred Scripture, the denunciation of injustice is always done in order to move the rich to penance (25) –never in order to stir up feelings of revenge or a "class consciousness" among the poor.

For this reason, too, the preferential option for the poor must be made "without viewing the poor as a class or in a class struggle," according to the above-quoted words of John Paul II. For the poor are never considered in Sacred Scripture from the "classist" point of view, not even when they are collectively referred to as "Jahveh's poor," –an expression whose meaning has been proved to be mostly spiritual rather than economic or material.(26)

The temptation to violence

In close connection with the Christian refusal to see the poor as in a class struggle, we ought to mention here another principle which appears in John Paul II's guidelines for a correct understanding and a practical realization of the preferential option for the poor. It concerns his *condemnation of the "recourse to methods of hate and violence."* The Church sometimes stands accused of claiming for herself a hopeless "neutrality" in the social struggle. By her condemnation of violence –they say– she is guilty of complicity with those who, from a position of power, perpetuate the oppression of the people, thus contributing to a situation which can only be eliminated by means of revolutionary force.

Although this accusation might perhaps sound plausible, it does not really stand to reason. It is true that *the Church always stands for peace*; but it is not true that the Church considers peace as the mere absence of struggle or of war. Peace is much more than that. According to St. Augustine's famous words, the Church understands that *pax hominum est ordinata concordia,* and also *pax est tranquillitas ordinis.*(27) Wherever there is oppression or injustice there cannot be real order, or, consequently, true peace. Besides, philosophical ethics and moral theology have always accepted the possibility of using violence in cases of *legitimate self-defense.* Nor does the Magisterium deny this. What is condemned –today and always– is the *systematic and deliberate recourse to blind violence.*(28) In principle, therefore, the people –or a part of it– could legitimately act in self-defense, even violently, against those who trample upon their rights. Certainly, the Church has always condemned *revolution in the strict sense,* i.e., the violent supression of lawful authority by the people (29); but the Church never condemned *revolution in a broad sense,* i.e., the one directed against *unlawful* authority. It must be born in mind, however, that a lawful authority could, at times, become unlawful through the abuse of power. These ideas were dealt with by Paul VI in the following words: "a revolutionary uprising –save where there is a manifest, long-standing tyranny which would do great damage to fundamental personal rights and dangerous harm to the common good of the country– produces new injustices, throws more elements out of balance and brings on new disasters. A real evil should not be fought against at the cost of greater misery."(30)

It is true that the Church does not deny the theoretical possibility of a legitimate revolution in a

broad sense; yet this would be something altogether alien to her mission. Christ gave his Church no proper mission in the political, economic, or social order.(31) What is more, the Church also warns that "the overthrow by means of revolutionary violence of structures which generate violence is not *ipso facto* the beginning of a just regime."(32) To this basic remark she still has to add something based on experience: "Millions of our own contemporaries legitimately yearn to recover those basic freedoms of which they were deprived by totalitarian and atheistic regimes which came to power by violent and revolutionary means, precisely in the name of the liberation of the people."(33) History shows that revolutions carry within themselves an inborn tendency to be betrayed by those who start them, eventually leading to a newer system of oppression of the people. Besides, in the case of a Marxist-type revolution, such betrayal is essential to its nature, since it is "a revolution which can only succeed on condition that it betrays itself."(34)

What should be done then? Paul VI admits that "there are certainly situations whose injustice cries to heaven. When whole populations destitute of necessities live in a state of dependence barring them from all initiative and responsibility, and all opportunities to advance culturally and share in social and political life, recourse to violence, as a means to right those wrongs to human dignity, is a grave temptation."(35)

The Church, faithful to Jesus Christ, cannot yield to that temptation. On the contrary, through the fulfillment of her spiritual mission, she contributes in many ways to that liberation of the multitude of the poor which aims at obtaining for all a justice befitting their dignity of men and of children of God.

Justice, Charity, Liberty

We have no space here to dwell on the various functions corresponding to the pastors and the laity as regards the just regulation of temporal matters.(36) We would like to dwell, instead, on the *notion of justice.* It is common knowledge that justice and the rights of man are related concepts, to the point that "the fight for the rights of man, which the Church does not cease to reaffirm, constitutes the authentic fight for justice."(37) The rights of man –which do not pertain only to the material level– can be formulated fairly precisely. Yet, some of them show ill-defined contours in the concrete situations of real life. One can think, for example, of the right to receive a just salary for one's work. The dividing line between what is just and unjust –and therefore the *specific* content of this right– is not at all evident. Real situations are often complex to the point that the problems of justice do not have just one possible and clear solution. It is a fact, however, that the difficulty often has to do with man's heart rather than with external objective problems. Hence, when appraising a situation such as, for instance, whether a certain inequality is just or injust, there is the temptation to consider something as being "natural" or "just" simply because "that's the way it always was." From this point of view, slavery could still be judged by some as natural and just.

This is why the ethics and moral theology within liberation theology must face the task of analyzing the real content of justice in specific and changing situations, always in keeping with the social teachings of the Church. It is obvious, however, that, even if theology should offer new and clear solutions where there are none today, a wide margin of indetermination and of pluralism would still remain as to the practical options to put them into practice.(38) And, above all, there would still remain the need to have the right men –just men– to carry them out.

In view of all the foregoing, the search for solutions to the "social question" must be given an increasingly "personalistic" slant –rather than a "structural" one– since it becomes obvious that the basic mission of the Church in this field is the *promotion of justice as a virtue* in all persons. Justice in this sense is much more than the simple awareness of what is just or unjust: it is an energy compelling man to act according to justice even when the boundary between justice and injustice is not clear and even when the structures theoretically allow him to act unjustly. In the encyclical letter *Laborem exercens,* John Paul II took a personalistic view of the subject of human labor, which "is probably *the essential key* to the whole social question"(39) and offered some exacting doctrinal clarifications; but one fears that they were not taken seriously even by those Christians who are personally implied by them.

Let us say again that there is hardly anything more practical than a good theory. But now we would slightly qualify this principle by saying that there is hardly anything more effective than a good theory made alive by the will of a capable man. The personal virtue of justice is precisely the necessary capability to effectively carry out justice.

A valid theology of liberation should not restrict its scope to the realm of justice. It must reach further, towards *charity*; for through love alone can

man associate with other men as children of God and as creatures made unto his likeness. Besides, only through charity can we overcome the "existential" problem posed by the fact that the border line between justice and injustice is often blurred. To speak of charity in the context of liberation is not just a "pious additive"; it is an intrinsic and uncompromising requirement, since, in the supernatural order of redemption, freedom belongs to and is a part of charity. *Libertas est caritatis,* according to St. Augustine (40): only someone who is free with the full and new freedom *wherewith Christ has made us free* (41) can be in a position to act effectively for the freedom of all.

Having come to this point, one remembers the words of a modern spiritual classic: "I'll tell you a secret, an open secret: these world crises are due to a lack of saints. God wants a handful of men 'of His own' in every human activity. Then . . . *pax Christi in regno Christi* –the peace of Christ in the kingdom of Christ."(42) The idea, however, does not contemplate some very saintly people, unencumbered with professional training, as leaders of the political and social activities, in a sort of latter-day "Sacred Empire." What the Founder of Opus Dei meant by the words just quoted is something quite different: he means that the *professionally competent* men in the leading positions of society should receive from the Church the Word of God and the grace of Christ, so as to commit themselves fully –if necessary, heroically– to impress upon man's earth, through the *sanctification of work,* the likeness of God that they, as Christians, bear on their faces.

We seem to have wandered away from the subject of the preferential option for the poor. The fact is that the Church's efforts towards the evangelisation and sanctification –or, perhaps, the conversion– of those in responsible positions of society is at least an essential part of the contents of that option for the poor. If taken seriously, it is perhaps the most difficult and the most binding part; but it is also the most effective way to achieve truly deep and lasting results in the field of justice for people and among peoples.

REFERENCES

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(4) Cf. John 14, 6
(5) Cf. S.C.D.F., Instr. *Libertatis nuntius, cit.* X, 3
(6) *Gaudium et spes,* no. 10
(7) Cf. S.C.D.F., instr. *Libertatis nuntius, cit.* V, 8
(8) Gal. 4, 31
(9) Cf. John 8, 34; Rom. 6, 17–18
(10) Cf. 2 Pet. 1, 4
(11) John 8, 34; cf. Rom. 6, 17–18
(12) J. Escrivá de Balaguer, *Christ is Passing By,* Veritas Publications, Dublin 1974, no. 167
(13) Cf. S.C.D.F., instr. Libertatis nuntius, cit., VI, 5
(14) Paul VI, apost. exhort. *Evangelii nuntiandi,* Dec. 8, 1975, no. 18
(15) 1 John 3, 2 a
(16) 1 John 3, 2 b
(17) Apoc. 21, 1
(18) Apoc. 21, 4; cf. 1 Cor. 15, 26
(19) Heb. 2, 25
(20) Cf. Phil. 1, 21
(21) Cf. Matt. 10, 38; Col. 1, 24
(22) Cf. S.C.D.F., instr. *Libertatis nuntius, cit.,* VI, 5
(23) John Paul II, homily, Oct. 11, 1984, "L'Osservatore Romano" English edition, Nov. 26, 1984, p. 3
(24) Cf. Matt. 9, 13; 1 Tim. 1, 15
(25) Cf. Osee 2, 6–7; 8, 5–6; Prov. 30, 14; Luke 20, 47; Jas. 2, 5–8; etc.
(26) Cf. R. Rabanos-J.M. Casciaro, *Pobres de Yahvé,* Gran Enciclopedia Rialp, vol. 18, pp. 653–656
(27) St. Augustine, *De Civitate Dei,* XIX, 13; cf. *Gaudium et spes,* no. 78
(28) S.C.D.F., instr. *Libertatis nuntius, cit.,* XI, 7
(29) Cf. Leo XIII, enc. *Immortale Dei,* no. 10
(30) Paul VI, enc. *Populorum progressio,* no. 31
(31) *Gaudium et spes,* no. 42
(32) S.C.D.F., instr. *Libertatis nuntius, cit.,* XI, 10
(33) *Ibid.*
(34) A. del Noce, *Tradizione e Rivoluzione,* in "Atti del XXVII Convegno del Centro di Studi Filosofici tra Professori Universitari, Gallarate, 1972," Ed. Morcelliana, Brescia 1973, p. 51
(35) Paul VI, enc. *Populorum progressio, cit.,* no. 30
(36) Concerning this subject, *vid.* II Vat. Council, *Lumen gentium,* nos. 31 and 36; const. *Gaudium et spes,* no. 43; decr. *Apostolicam actuositatem,* nos. 2 and 24
(37) S.C.D.F., instr. *Libertatis nuntius, cit.,* XI, 6
(38) Cf. *Gaudium et spes,* no. 75
(39) John Paul II, enc. *Laborem exercens,* no. 3
(40) St. Augustine, *De natura et gratia,* 75, 78
(41) Gal. 4, 31
(42) J. Escrivá de Balaguer, *The Way,* All Saints Press, New York, 1963, no. 301