

**The Church in Globalization: A World-Systems Analysis on the Influence of Liberalism in
Modern Catholic Social Thought**

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Abstract

It is within the realm of the international civil society that religions play out their important public roles as charities and advocacy organizations in globalization. World governance models in the post-Cold War era stress the important role that civil society plays in building and sustaining democracy. Indeed, the participation of the Catholic Church in the "third wave of democratization" confirms this. Yet, twenty-five years after the collapse of international socialism, problems with American-led models of development have come to the fore in glaring ways. Growing wealth inequality and what Gayatri Spivak calls "sustainable underdevelopment" are the norm, and these problems highlight the dangers and instability of liberal economic policies. Religious organizations, and proponents of the Catholic social tradition in particular, have been the strongest voices for advocating social justice and advancing policies that pursue "the common good." Both working to alleviate poverty as charities ([i]NGOs and FBOs) and using their voices as a "public religion" (José Casanova) in civil society, Catholic institutions navigate the historically constructed and contingent boundaries among the three spheres of the state, the market, and civil society. Studying this interplay has provided fruitful theories deconstructing the religious/secular binary. In light of these theories, this thesis applies the critique of liberalism supplied by world-systems analysis to the development of Catholic social thought, in the process highlighting a complex history of complicity and dissent with U.S. liberalism's unfolding hegemony. In circulating Catholic social thought through the economic focused paradigm of world-systems analysis, I explore the possibilities of seeing religion and globalization outside a culturally focused framework. How the social magisterium is responding to the problems of economic globalization in an increasingly unstable world will affect its future legitimacy. I explore where the Church has been and its capacity to be a continually proactive force for "social justice" and "the common good."

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Part I: The Context of the Work, Its Method and Structure

1. Introduction

American Catholic philanthropist Charles Keating is a fraudster.¹ During the 1989 Savings and Loan Scandal Keating ripped off over 20,000 households and became the emblematic figure of the crisis, a crisis which cost the US taxpayer \$2.5 billion in bailouts. Keating himself made over 250 million on crooked deals defrauding retirees and mostly poor families of color in Southern California where his firm, Lincoln Savings and Loan, operated. Adjusted to inflation that's over 400 million dollars today. During the trial, for which he ultimately received 10 years in prison, a letter from Mother Teresa was read asking the courts for clemency. Over the years Keating had donated over \$2 million to her organization. Why did it not bother Mother Teresa that these donations came at the cost of the retirement investments and savings of 12 thousand elderly couples and the houses of 8 thousand poor families? Today \$2 million seems like a bargain price for a letter of clemency from one of the world's top moral do-gooders; but then again, twenty-five years ago there weren't as many billionaires as there are today.

Perhaps it wasn't just Keating's donations that Mother Teresa was writing on behalf of but his pioneering work advancing Catholic causes in the US. The Catholic face of Charles Keating was famous for his personal crusade, beginning in 1954, against pornography. In 1956 he founded his "Citizens for Decent Literature" which was renamed a number of times, but grew into the largest anti-pornography group in the country, at one point claiming 100,000 followers in 300 chapters. To Keating pornography represented a communist conspiracy to corrupt the children of America, and he spent considerable time on bogus studies connecting pornography to

¹ "Charles Keating." The Con Artist Hall of Infamy; accessed September 14, 2016, http://archive.pixelettstudios.com/hallofinfamy/inductees.php?action=detail&artist=charles_keating.

child social delinquency, or refuting scientific studies that disproved these connections. He also operated at the state level fighting to get decency laws passed that closed adult movie houses and erotic and gay bookstores. And Keating is also on the public record stating that homosexuals should be imprisoned forever.²

Keating, like many financial swindlers today, sees himself as innocent and believes that the regulators were to blame, a common response even after the 2008 financial crash from which we are still suffering. A man who personally and concretely destroyed tens of thousands of families is fighting for family values; but then again, everyone believes in their own virtue. He gets a letter from Mother Teresa asking the courts for clemency when he isn't even repentant or sorry.

"People don't realize how wealthy people self-tax," responded Wyoming mutual funds investor Foster Friess when asked by Chrystia Freeland of the *Financial Times* about America's hardships and if the wealthy should pay a bigger share to help out. Friess continued:

You know, there's a fellow who was the CEO of Target. In Phoenix, he's created a museum of music. He put in around \$200 million of his own money. I have another friend who gave \$400 million to a health facility in Nebraska or South Dakota, or someplace like that. You look at Bill Gates, just gave \$750 million, I think, to fight AIDS... I think we should get rid of taxes as much as we can, because you get to decide how you spend your money, rather than the government. I mean, if you have a certain cause, an art museum, or a symphony, and you want to support it, it would be nice if you had the choice to support it. Where we're heading, you'll be taxed, your money taken away, and the government will support it. It's a question — do you believe that the government should be taking your money and spending it for you, or do you want to spend it for you?... If you look at what Steve Jobs has done for us, what Bill Gates has done for society, the government ought to pay them. Why do they collect money from Gates and Jobs for what they've contributed? It's ridiculous... It's the top 1 percent that probably contributes more to making the world a better place than the 99 percent. I've never seen any poor people do what Bill Gates has done. I've

² "Charles Keating." Wikipedia; accessed September 14, 2016, https://en.wikipedia.org/wiki/Charles_Keating.

never seen poor people hire many people. So I think we ought to uplift the 1 percent, the ones who have created value. (Foster Friess quoted in Freeland 2012, 246-247).

Friess came to the public attention when it was revealed that he was the main financial contributor to Republican primary candidate Rick Santorum's super PAC. In the 2012 republican primary Santorum was the Catholic contender who was constantly in the news for his position on gays.

I begin this thesis with these two prominent examples to show that a new way of being Catholic has emerged in the late Twentieth century, one that I argue is at fundamental odds with the Church's older commitments to the poor and social justice. To introduce the problem of my investigation simply: what makes a Charles Keating possible?

It is the purpose of this thesis to answer this question in a detailed review of the literature surrounding two areas of study; (1) the history of the hegemony of liberalism emerging in economic globalization through the framework of world-systems analysis; and (2) the tradition of Catholic social thought and its complex relationship with liberalism expressed in a history of documents, councils, encyclicals, apostolic letters and theological debates and conflicts. The field of religion and globalization also helps me situate the importance of this thesis: particularly scholars who have sought to provide a theory on the influence of religion in world governance models. In this introduction I highlight the importance of understanding the Catholic Church in a globalizing world. These world governance models stress the importance of civil society in building and maintaining democracy. The work of these scholars stress the intersections between religion, culture, technology, politics, and economics, complicating and qualifying the theory of secular differentiation attributed to liberal modernity.

1.1. The Context of The Work

What Catholic social thought has identified as "radical capitalist ideology," and world-systems theorists name "centralized monopoly capitalism," has increasingly become a category of analysis in understanding globalization. The scholars I consult in Parts One and Two agree that since the Reagan/Thatcher era a revolution, or counterrevolution, has occurred which has seen the dismantling of government regulations, oversight, and intervention in the work of business, industry, and finance that has led to an unprecedented rise of power in a new global super-rich elite investor class. This new global super-rich, in their unwillingness to contribute some of their success back to the social infrastructure that has made possible that success, have made "entitlement reform," austerity, structural adjustment, and "balancing the budget" the priority of contemporary politics in both "left" and "right" parties. This interdependent trend — the rise of a global super-rich that has become increasingly unaccountable (and often corrupting) of the legal and sovereign mechanisms of nation-states, and the dismantling of redistributive government funded services once defended in the name of the "public good" — has led to a situation of wealth inequality that by some measures has never existed before, not even in ancient slave-holding empires (Graeber 2012).

This massive concentration of wealth correspondingly signals an equal concentration of political power and has effects on democratic institutions which have been documented in countless recent studies. I review these studies in chapter 2. Global annual summits such as the World Economic Forum in Davos, where the economic, business, political, and policy elites gather to discuss solving the world's problems, is a symptom of the hollowing out of popular traditions of mass party democracy. Recent trends isolating economic policy decision making power to unelected institutions and policy elites, such as central banks or the European Commission, also show a discursive shift which chides party democracy as unstable and

damaging to economies by viewing economic policy as too important for elected politicians to decide.

Global social movements, such as those represented in the annual World Social Forum, have taken decades to organize opposition to global liberal capitalism. These movements comprise indigenous groups, environmentalists, trade unions, women's organizations, and for the purposes of this thesis, religious social justice advocates. Elites who recognize that such inequality is unsustainable, and who also recognize the corrosive effects wealth inequality has had on the social fabric, also have no intention of letting these groups gain access to decision making power. Just as these movements are gaining momentum and making progress, they are being criminalized and politically targeted. They represent a threat in that they represent an alternative, one that hasn't existed since the fall of international socialism in the late 1980s and early 1990s.

The defeat of communism has given an ideological legitimacy to American capitalism which has helped liberalism's global expansion. Twenty-five years after the events surrounding the fall of the Berlin wall, the hegemonic model of economic liberalism is being challenged by these popular social movements. World-systems analysts call these "antisystemic movements," and Pope Francis has given a moral imperative to the struggle for global economic justice. While Catholicism is just one religious institution among many, its global size and reach has made it a substantial ally to this struggle, and Francis' significance as the first Latin American pope has furthered these inspirations for change.

Yet if the Reagan and Thatcher revolutions were meant to "change the soul" (Margaret Thatcher), no one did this better than John Paul II. At a time when Catholic social thought was

calling for outright socialization and massive government redistributive programs around the world, specifically in the papacies of John XXIII and Paul VI (which I treat in chapter 6), John Paul II reversed these calls for economic justice by first ignoring and downplaying the older tradition, and then redirecting Catholic social teaching towards American liberal models of development (which is the focus of chapter 7). The unprecedented attendance of world leaders at his funeral shows how historically important he was in the breakup of the Soviet Union and international socialism. Whether or not communism was a "corrupt monstrosity" is tangential to the argument that as the only global alternative to economic liberal development it had a regulating effect on liberal capitalism. To state it in another way: the criticism from the "second world" leveled against capitalist liberalism proved a sobering influence on the West and forced it to develop a type of "capitalism with a human face." What Dwight N. Hopkins (2001) refers to as the spread of "the religion of globalization" — deregulation, privatization, cutting social services, and the rise of the "holy trinity" of the World Trade Organization, multinational corporations, and global finance (including the IMF) — is the result of the collapse of the "logic of two blocks" that John Paul II criticized throughout his social encyclicals (Curran 2002, 206).

My foray in chapter 2 into the studies, events, and issues that have exploded into the public imagination shows both how severe the global situation has become, but also that the world is achieving a proactive level of awareness. Whether democratic mechanisms of change will accommodate the policy alternatives needed to stem the tide of global inequality, or whether such ennobled elites will peacefully accept such change, remains to be seen. So far the prospects appear less than promising. But what the late Thomas Berry said about religion(s) in the ecology movement aptly applies to religion in the fight for economic justice: "religions in their current

form cannot respond to this magnitude of crisis, and we cannot respond without them" (Thomas Berry quoted in Eaton 2014, 169).³

Progressive religious responses to these issues are being formed. This is shown in the number of religious clergy and leaders being arrested in acts of civil disobedience, the immense growth of and support for religious social justice movements, and the organizing of even the youth in evangelical congregations. All these signs show a hope for a new religiously mobilized moral movement. The Moral Mondays movement in North Carolina, for instance, shows that Christian institutions can drop their insistence against gays and abortion to collectively organize mass movements alongside, and in solidarity with, gay rights groups, planned parenthood and reproductive rights advocates, public and private unions, environmentalists, and others to tackle the more pressing issue of economic injustice and its asymmetric impacts on diverse and marginalized communities.

Culminating in the Second Vatican Council and its immediate aftermath in the papacy of Paul VI, Catholic social thought throughout the Twentieth century was on an evolving trajectory towards advocating justice-oriented social and economic goals and proper and fair international development. Coming out of the social turbulence of the industrial revolution in Europe, Leo XIII's *Rerum novarum* (1891) was the first encyclical to deal with the consequences of massive economic changes and political upheavals brought about by liberal capitalism. This encyclical is considered by most scholars to be the definitive starting point of the Church's tradition of modern social teaching. While a modest beginning, the tradition evolved throughout the Twentieth century's struggles with the rise of liberalism, fascism, socialism, and communism. I chart this

³ Katherine Marshall (2012) also notes that in international development circles a common phrase one hears is "religion is part of the problem and part of the solution" (Marshall 2012, 202).

evolution and social history in Part Three and go through each of the main encyclicals and events which have characterized this changing tradition. The shift that began with John Paul II shows a move towards economic liberalism which saw its zenith in Benedict XVI's papacy and his encyclical *Caritas in veritate* (2009).

1.2. The Thesis Question

How did the papacy and work of John Paul II and Benedict XVI advance an economic liberal model in the tradition of Catholic social thought? And how did such changes help give rise to an unacknowledged Catholic justification of liberal capitalism birthed in the period of the 1980's and advanced in the aftermath of the Cold War? What changes were made to the tradition of Catholic social teaching that helped justify the economic globalization we have witnessed so far? And how does an examination of this history advance theories of the relationship between religion and globalizing economic policies and structures of world governance?

If in Part Three I highlight the shifts within the tradition, chapter 7 outlines a history of the internal struggle within the Church in the period under consideration: the end of the Cold War to the present. Throughout, I apply the world-systems analysis I outline in Part Two to the developments of Catholic social teaching. In this way I hope to highlight the intersections between the differentiated "function systems" (Peter Beyer 2001 and 2006) of religion, politics, and economics that characterize the structures of the modern interstate system with regards to global economic liberalism.

I opened the introduction with two stories that show how religion, when not explicitly against such rapacious greed, becomes a legitimizing ideology to further rapacious greed and political corruption. Charles Keating and Rick Santorum can be described as undeniably Catholic in the present historical period because the tradition ceased at one point to outright

condemn such greed and selfishness as being at odds with Catholicism. Instead, their homophobic and anti-choice credentials come to be taken as a legitimizing Catholic ideal, allowing their socially destructive actions to continue without censor. This thesis is a history of how such a situation has become possible. As stated before, how can a man like Charles Keating who concretely destroyed tens of thousands of households be said to be for a Catholic tradition of family values? Why not deny communion to financiers or those engaged in predatory lending practices in the same way that the Church denies it to "practicing" homosexuals, divorced or remarried Catholics, and women who have had abortions? How is the discriminatory obsession with LGBT persons and feminism a symptom of the Church's acquiescence to liberalism? That is, what is the historical development of the preoccupation with personal sexuality and individual morality — which is played out in the political society and comes to serve conservative forces — within the tradition, and how is this connected to the liberalization of Catholic social thought?

I examine why the liberalization of modern Catholic social thought does not lead to a democratic Church, but rather the opposite. As the liberal world religions model secures the Church within the global religious function system, the Church itself becomes a reactionary social force with internally authoritarian structures. The history of Catholic social thought is a history of this development.

1.3. Globalization and Religion: Civil Society in Post-Cold War World Governance Models

Catholicism's uneasy relationship to the unfolding of liberal capitalism is the main history this thesis examines. The Church moves through the nineteenth and twentieth centuries from conflict with liberal ideological and economic programs to eventual acceptance and even the championing of liberal human rights and democracy. While this is often viewed as a positive historical development, it also represents a convergence of Catholic social teaching and

American liberalism. This thesis touches on the history of Catholic social thought in a period where the Church has been given an important position in post-Cold War world governance models. These liberal models are characterized by the importance of civil society in building and maintaining democracy. Briefly, with the collapse of international socialism and welfare state models, international voluntary associations in their varied forms replace state-based models of development. It is in the sphere of the international civil society that religions act their roles as charities and alternative social service providers under globalizing liberal capitalism. A new form of "public religion" (José Casanova) emerges, and this process problematizes the private/public and secular/religious binaries and reflects not so much a "resurgence of religion" but rather "a series of challenges to the fundamental assumptions that sustain particular authoritative secularist settlements" (Shakman Hurd 2008, 143). Religious voices in this capacity have the ability to call for greater economic justice and political freedoms; though as this thesis examines, they often use this position for reactionary purposes: in the past for the political repression of leftist inspired religious movements, and recently, anti-choice sexism and homophobia. That religious bodies are undemocratic and androcentric has of course been said many times; but what are the structures of governance under American liberalism that gives these institutions a greater say in the public sphere? How are religions brought into play to serve the class interests of contemporary liberal capitalism?

John Courtney Murray opened up the Church to an engagement with liberalism by distinguishing between continental liberalism, whose anti-clericalism characterized the Church's major political conflicts in nineteenth-century Europe up until after World War II, and an American-style liberalism which emphasizes free exercise within non-establishment (Komonchak 1994, 85-86). These two forms of liberalism roughly correspond to Elizabeth

Shakman Hurd's distinction between laicism and Judeo-Christian secularism, which she claims are still operative in the field of international relations today.⁴ While the former sees religion as a danger that is fundamentally at odds to the liberal nation-state and the liberal project of development, the later, beginning with Alexis de Tocqueville's observations on American democracy, emphasizes the importance of the interplay of voluntary associations for sustaining a vibrant and functional democracy. In the field of international relations this American paradigm seeks to strengthen these voluntary associations in the aim to advance sustainable democracies (see also Casanova 2011).⁵ It is religions in their place as voluntary associations within (international) civil society that José Casanova (1994) articulates his theory of "public religions."⁶

A central thesis and main theoretical premise of this work has been that what usually passes for a single theory of secularization is actually made up of three very different, uneven and unintegrated propositions: secularization as differentiation of the secular spheres from religious institutions and norms, secularization as decline of religious beliefs and practices, and secularization as marginalization of religion to the private sphere (Casanova 1994, 211).

⁴ This distinction is also the difference between classical liberalism and the contemporary liberalism of someone like John Rawls. Sabastiano Maffettone notes that classical liberalism was based on an "ethics of restraint" that advocated the privatization of religion, while Rawls' theory emphasizes a "liberal ethics of reciprocal respect" in the forging of an "overlapping consensus" of differing "comprehensive doctrines" (Maffettone 2010). We can also characterize this shift as one between secular reason and public reason, with the later being more accommodating to the voice of religious comprehensive doctrines in the public sphere. Rawls' thought also changed over the years in regards to the question of religion: "Rawls himself was certainly a religious person, even if his relation with religion became more troublesome over the years. Probably one of the deepest motivations behind PL [*Political Liberalism*] consists precisely in conceding to religious people the maximal space compatible with a liberal-democratic polity" (Maffettone 2010, 12). Chris Brown (2007) distinguishes between Continental liberalism and Anglo-American liberalism, and between cosmopolitan liberalism and pluralist liberalism (152). Brown notes that the "good" of liberalism is based on the individual over and against "God" or the "common good" in Catholicism. This is a continuing theme I treat throughout the thesis with Catholic human rights theory which stresses human rights coupled with reciprocal duties.

⁵ "Karl Marx of all people, articulated the unique paradox of American exceptionalism most succinctly in his essay 'On The Jewish Question' when following Tocqueville he observed that America was both the model of 'perfect disestablishment' and 'the land of religiosity par excellence'" (Casanova 2004, 113).

⁶ He does mention two other expressions of public religions; namely, state churches that fuse the state and religion, and religions that engage in lobbying activities and act in "political society" through political parties and social movements. Casanova also mentions that his 1994 work normatively attempted to prescribe "modern public religions to the public sphere of civil society" (2012, 26). The Catholic Church throughout the world has engaged in all three of these public religions; at the level of the state, political society, and civil society.

Only secularization as differentiation can be said to be valid historically, and it is in the sphere of civil society, or the "third sector" between state (first sector) and economy (second sector), that religions play their important contemporary public role (Thomas 2005, 99). Shakman Hurd states that both laicism and Judeo-Christian secularization differentiate the religious and secular spheres as "strategies for managing the relationship between religion and politics" (2008, 138). But laicism takes on the political program of privatizing religion and setting into place the social structures that will lead to religion's decline. This is not the inevitable development of modernity (i.e. scientific rationality will overcome religion), but is rather the result of the political programs carried out by liberal nation-states that commit to laicism.

Citing Leslie Griffin, J. Bryan Hehir, and Jeffrey Hadden, David Hollenbach outlines the public capacity that the newly drawn boundaries contain for Catholic teaching:

disestablishment and religious freedom can be conducive of greater public activity by religious communities. In this activity, the central principle is that the church's social role must always be religious in nature and finality. Nevertheless, the exercise of this role will frequently have politically significant consequences. The church's proper competence is that of addressing the moral and religious dimensions of political questions (Hollenbach 2003, 89).

In almost all the encyclicals identified with the Catholic social tradition, qualifying statements are made in their openings. These statements claim that the church in no way aims to be experts in the areas of economics and politics, but, that where these issues touch the lives of the faithful, or intersect with ethical and justice issues, the Church maintains its right to give its voice.

Particularly in the American context, the two famous pastoral letters of the 1980's, *Economic Justice for All* (1986) and *The Challenge of Peace* (1983), walk this tightrope between the liberal differentiated spheres of economics, politics, and religion.

Russell Hittinger notes that although based on morally and philosophically different grounds, liberalism and Catholic social thought "both called attention to the importance of civil society vis-a-vis the state; both developed rights-based arguments in defense of civil society" (2008, 13). The development of Catholic social thought in the latter half of the twentieth century is precisely this process of coming into alignment with American liberal political and economic thought. This slow and partial acquiescence is obscured by the common focus on the Church's sexual teaching, which casts the conflict as one between recalcitrant religious moralism and liberal sexual freedom. However, politically and economically, the social doctrine of the Church has become a vehicle in the advancement of American liberal models abroad, and both American liberalism and Catholic social thought have converged, "[s]o much so, in fact, that on any number of matters that are of real consequence they now deserve to be thought of much more as allies than as adversaries" (Douglass 1994, 9). In the process of such an ideological alignment the Church became one of the most influential actor in what Samuel Huntington called "the third wave of democratization" during the 1980's, toppling both socialist and national security states (Haynes 2001 and 2012; Witte and Green 2012).⁷ As a result the Catholic Church emerges as a powerful voice using what Haynes has named "transnational religious soft-power" (2001 and 2012; see also Steiner 2011) in the early 1990's in the emerging "the new world order" of reinforced American liberal hegemony on the international stage. Although world-systems analysts state that the American hegemon emerges after World War II, this triumphalist unipolar situation is most famously expressed in the "end of history" argument of Francis Fukuyama (Brown 2007, 168). I deal with this history in chapters 3 and 4.

⁷ The first wave was the American and French revolutions, the second wave was the democratization pursued by the allied powers in the former axis countries (Hollenbach 2003, 125).

In the aftermath of the Cold War the Church (and religions in general) is given a privileged position in emerging world governance models (Lynch 2011, 208; see also Anderson 2009). These models highlight the importance of civil society to the maintaining and building of democracy, and it is within the sphere of (international) civil society that religions are building their public influence. Particularly in the Eastern European scene, the role of the Churches in the overthrow of communism showed the power of civil society groups for democratic revolution, and it was the experience of religions in these efforts that helped secure their roles in world governance models in the global era. The 1990's saw an explosion of international non-governmental organizations ([i]NGO's) and transnational faith based organizations (FBO's) (Thomas 2005, 102). Voluntary associations seeking "private/public partnerships" (funding from states and private donors) replace state health and education programs with the loss of socialist alternatives to development and the collapse of the welfare state model; with the global unfolding of this American model, voluntarism and "charity" replace "entitlements" (Davie 2001). In this set-up the secular state funds the activities of religions through the various networks within national charities and within the structures of international development aid.

A type of "subsidiary state" emerges, showing again the affinities between American hegemonic models of democracy and Catholic social thought. The concept of subsidiarity is a major aspect of Catholic social thought, and I deal with its development throughout the tradition in chapters 5, 6, and 7. Kenneth Grasso elaborates:

the subsidiary state would respect the identities and legitimate autonomy of the various institutions and groups to which human nature gives rise, as well as their right to discharge their functions... [i]t would not simply leave these groups to fend for themselves but would seek to actively assist them (Grasso 2008, 48).

Neither libertarian nor statist, the model of democracy that characterizes contemporary world governance structures funds civil society, and while this is not bad in itself, indeterminacy and contingency mar the trajectory of development.

The resulting power of religious groups in civil society blurs the lines between the historically constructed boundaries of the political, economic, and religious. In highlighting the importance of Foucault's notion of governmentality to the explosion of NGOs in the neoliberal context, Cecilia Lynch observes:

Governmentality highlights how contemporary governance mechanisms interpellated by states and international organizations facilitate and even require the expansion of NGOs into 'issues hitherto held to be the responsibility of authorized governmental agencies.' Increasingly, foreign aid is channeled through NGOs, including faith-based organizations... According to the governmentality paradigm, however, such influence by NGOs does not translate into independence for civil-society actors, who must constantly demonstrate their worthiness to assume the functions previously allocated to the state, by carrying out their tasks 'in accordance with the appropriate (or approved) model of action. Approved models of action include results-oriented market discourses (Lynch 2011, 213-214).

In this way civil society groups are oriented towards market forces, and whatever social justice ideology they may have is lessened due to their functioning capacities in governance models. As David Harvey has famously stated, the revolution will not come from NGOs.⁸ I deal with this issue further in chapter 2 and also Part Two. Like the NGOs, religions are also made to downplay their more radical ideas of change in order to operate in this sphere, and this ties into the overall secularization model that differentiates the three spheres of economics, politics, and

⁸ Arundhati Roy (2011 and 2014) talks about the globalization of corporate foundations beginning with the Rockefeller Foundation in the first gilded age, the Ford Foundation in the post-war period, and the Bill and Melinda Gates foundation today. An important point to note is that the development of the (i)NGO model is intimately tied to these charitable foundations who, in many ways, act as pro-corporate lobby groups wearing the mask of tax-free charities.

civil society. The individual moral sphere, constructed and allotted to "religions," creates the limits of religious advocacy. The intersection of elites and the hierarchies of religious groups also impose limits, and this scars the whole social encyclical tradition: capitalism, even though condemned, is always reformable through a change of heart and morality; yet socialism is always more or less evil. I treat this observation throughout Part Three, but in many ways this issue informs the whole of the thesis.

Secularism, as the political program of historical differentiation between spheres or sectors (Shakman Hurd 2008, Beyer 2006), becomes complicated in the transition from European to American models of liberalism, and the history of this transition reveals the constructed nature of such boundaries. Scott Thomas traces the emergence of the prioritizing of civil society world governance models to the 1980's "ideas about democracy, good governance, and development policy that emerged from the Reagan and Thatcher years, and from the central European intellectuals who revived the concept of the civil society to help bring the collapse of Communism" (Thomas 2005, 102). Thus, the world governance models that prize civil society — although with intellectual roots in Tocqueville's observations in early American liberal democracy and the role of local churches in civic life — emerge in the post-Cold War period with very different civil society players: world religions and corporate charitable foundations among others. Matthew Weiner brings up the debate between José Casanova and Talal Asad on the nature of religion in civil society. To Casanova, religion and civil society shape one another when religion goes public in this way; to Asad, religion "is necessarily structured by modern governmental structure when it engages in public discourse" (Weiner 2010, 296). My investigation into Catholic social thought highlights the effects that American liberal hegemony has on the tradition.

1.4. The Church and Globalization: Modern Catholic Social Thought as an Ambiguous Resource

Scholars of Catholic social thought usually make a distinction between Catholic social teaching (or the encyclical tradition), which stresses the history of the official documents of the magisterium, and Catholic social thought, which is a much broader category and includes the numerous movements, charities, and theological scholarship that emerges from Catholic engagement in the world. I also use the phrase "social Catholicism," which in the past (in the pre-Vatican II period) meant a type of Christian socialism, but others refer to it along the same lines of Catholic social thought or the Catholic social tradition. The boundaries between these categories are not that clear, and indeed the movements, charities, and theologies often inform the work which comes out in the encyclicals. This thesis is an examination of the encyclical tradition, as the project itself is geared towards an examination of the shifting priorities of the hierarchy in its acquiescence to American liberal hegemony. The hierarchy also plays a role in disciplining the more radical elements and movements of the larger category of social Catholicism, bringing them in line with the magisterium's orientation: specifically against socialist elements in the twentieth century.

The potential influence of Catholic social teaching has been best described by John Coleman, who notes that the encyclicals

tended to be read, absorbed and commentated on mainly by socially involved Catholics who generally gave them a more progressive interpretation than their location in historical context might have warranted. The encyclicals, then, represent on some sense a genuine unified tradition of sane and humane social thought which we both celebrate today and try to bring forward into the future (Coleman cited in Higgins 1993, 353).

As the influence of the US bishops' pastoral letters in the 1980s attest, the influence of the social encyclical tradition on economic and public policy does not appear very strong. Furthermore, as

Coleman (2003) notes in his treatment of welfare reform in the US during the 1990s, Catholic Charities USA and the United States Conference of Catholic Bishops (USCCB) advocated for aid to the poor and the importance of services to needy families and expressed concern that the reforms proposed would put an undue burden on charities and that the state should not abandon its role in securing for people their basic needs. But the Catholic response also bought into and reproduced the conservative discourse of "welfare dependency" and the need for responsibility and accountability — discourses that helped to put an end to welfare provisions (Coleman 2003, 258-260). There is an ambiguity which easily lends itself to conservative forces; or rather, the interplay between economic justice and charity throughout the tradition motivates differing political factions. To progressives the tradition motivates their work for social justice; to conservatives, especially in recent years, it validates private property and the importance of markets.

Catholic social teaching sees globalization ambiguously as well; as John Paul II has famously said, "it will be what people make of it" (John Paul II quoted in Coleman 2005b, 23). While echoing this line, Benedict XVI states that it is neither good nor bad; "we" should see it as an opportunity and take full advantage of what it can afford us (*Caritas in veritate* n.42). The agential "we" here is of course problematic, as neither the Church nor globalization are democratic forces, but is mostly an economic event. In this way we should take seriously Gayatri Spivak's idea of colonialism as an "enabling violation." That is, an economic system that brought in its wake a certain advancement in colonial societies that allowed a unification of struggle to produce national liberation (Spivak 2012a). This would see the "interconnectedness" attributed to globalization as a by-product of economic globalization. Or rather, the change

labelled as "cultural globalization" is the unintended consequence of political and economic restructuring on a global scale.

While official Catholic teaching cautiously applauds globalization — indeed, it helped bring it about in the fall of communism, and Catholicism has benefited from the new influence that civil society has been given in world governance models — Catholic social thought and movements for justice remain sceptical. These movements are backed by an older generation of social encyclicals that, even before social scientific scholarship, recognized the emerging patterns of globalization as far back as 1961, where John XXIII's *Mater et magistra* takes the encyclical tradition towards an international focus, and in 1967, where Paul VI's *Populorum progressio* mentions that the "social question" has become worldwide (*Populorum progressio* n.3). These older social encyclicals highlight the risk of a "neocolonialism" and stress economic justice, not charity, in the promotion of "integral" international development. These two popes also advocated the importance of a global authority needed to safeguard the common good against the trend of worldwide exploitation and the globalization of the social question. This began the long tradition of Catholic support for the UN and world development funds.

But, as J. Bryan Hehir famously asked, "can Catholic social thought survive globalization?", by which he highlights the challenge that globalization has had on the traditional formulation of the public authority (the state). To the social thought of John XXIII and Paul VI, the state is conceived as the necessary safeguard of the common good. National sovereignty is weakened by globalization, while the international structures that Catholic social teaching supported (the UN for instance) seem to "have reached their limits" (Cahill 2005, 43; see also Coleman 2004). This corresponds to what Susan Rudolph and James Piscatori (1997) have called "fading states." According to Jeffery Haynes, this work by Rudolph and Piscatori, still

represents one of the best contributions to the theorization of the role of religious actors as an element of transnational civil society in the context of the post-Cold War (Haynes 2012, 31).

Rudolph and Piscatori argue that what some are calling the "return of religion" corresponds to the rise of civil society more generally in a time of declining state sovereignty and shifting state monopolization (the monopoly on violence and other roles that have traditionally belonged to the state, such as welfare):

'The state is waning' suggests that it will vanish and be replaced by other forms of political organization. More likely is a progressive contraction of state activities and claims that would allow nongovernmental phenomena to share functions and meaning now monopolized by states. What this suggests is less a waning of states than a more complex set of interrelations in which rival identities and structures jostle the state. New alliances and goals become possible as domestic civil society joins up with transnational civil society to challenge states and as states in concert employ elements in transnational civil society to limit particular states' sovereignty (Rudolph and Piscatori 1997, 12).

Haynes tackles the question of sovereignty in a 2001 article and concludes that although religions, particularly the Catholic Church, challenged authoritarian regimes — and this led to the eventual collapse of socialist and national security states — this does not necessarily mean a challenge to the concept of sovereignty itself, since the Church has also defended the right of state sovereignty. Rather, the Church took advantage of new forms of emerging civil society and cross-border associational organizing in the period of globalization ("the crisis of territorial state sovereignty"); "its ability to deal with various crises was not linked to a challenge of state sovereignty" (Haynes 2001, 152; see also Casanova 1997, 131; and Rudolph 1997, 256).

The idea of "fading states" is nothing new to world-systems analysts as they hold that capitalism has always been globalizing. Since the establishment of the interstate system of nation-states with the Treaty of Westphalia (1648), capital has been transnational. One of the

main developments of the treaty was that commerce would continue even in times of conflict between states.⁹ World-systems theorists hold that the establishment of nation-states in historical capitalism does not necessarily mean that the world-system favors strong states (Meyer, Boli, Thomas, and Ramirez 2001, 25). Rather, the interstate system sets up weak states that are forced to compete for capital flows. The "strong" regulatory welfare state of the twentieth century is a long progressive development and aberration to historical capitalism; it is a reaction to the socialist project of "seizing the state" to establish communism. With the overthrow of "really existing socialism" the weak state re-emerges in a period characterized not so much as globalization, but rather what Saskia Sassen names "de-nationalization." I elaborate on this topic in chapter 3.

As a challenge to economic globalization Catholic social thought does prove a strong voice, and the social advocacy of Catholic organizations is invaluable in stressing just alternatives to American-led models of development. This thesis sees globalization through the framework of world-systems theory, and treats the development of Catholic social thought through the context of growing American liberal hegemony. And while the resources are there to provide Catholics and "all men of good will" with a framework which has historically situated itself between the extremes of liberal individualistic capitalism and socialist collectivism, the latest period, which seems to be ending with Pope Francis, has shifted the tradition towards an endorsement of American capitalism, but a capitalism in need of moral correctives.

Hehir identifies six core elements in Catholic social teaching on the economic order: (1) the international economy is the unit of moral analysis; while national economies play an

⁹ The Treaty of Westphalia was also important in that it did not include the Catholic Church in the formulation process, thus the Church was denied its "traditional role as international power broker" (Küng 2013, 148; see also Casanova 1997, 127).

important role, they are situated within this larger context; (2) the evolution of the Catholic justification of private property has developed in a way that stresses the importance of the "universal destination of the goods of creation" meant for all to enjoy; (3) the state has an important role in economic justice; (4) the economy is judged by its ability to meet the needs and welfare of all, and this ties into the Catholic theory of human rights coupled with both distributive and social justice; (5) the principle of subsidiarity ensures a sphere of freedom and initiative coupled with the state's socio-economic responsibility (the principle of socialization); and (6) the "option for the poor" sets a criterion in "assessing the justice of any social system" (Hehir 1993, 32). So we see that the tradition of Catholic social thought, in its development as a response to the social question, has evolved into a progressive critique of global capitalism. Yet this critique has been downplayed in the later Cold War and post-Cold War period; and, in spite of all the talk of the excesses of unfettered capitalism, the primary enemy of the tradition has almost always been socialism. This development has created the pharmakonic (both medicine and poison) ambiguity of the teaching. In this way, Catholic social thought will be "what people make of it."

1.5. Structure of the Work

This work is structured in three parts with eight chapters. This introduction has given a brief context to the work, outlined the thesis question, and situated the work in the field of religion and globalization.

In chapter 2 I outline the context of the work in more detail. I show that change is happening in the Church, and I outline the severity of the present moment with regard to global economic inequality. Inequality, with its subsequent new emergent racisms and political repressions, has become a feature of economic liberal policies which have been advanced since

the 1980's and enforced around the world through institutions of international governance. Religious institutions, and Catholicism in particular, have had a shifting relationship with these powers, and the tradition of Catholic social thought throughout the twentieth century has struggled to come to terms with fast shifting political ideologies and movements. Although Catholics have always been active on the social justice front, such work becomes easier when they have vocal and public support from the highest Church authority. In this way their efforts are legitimized and their actions and work become an example of Christian discipleship to be imitated.

Chapter 3 will outline the history of globalization through a literature review of world-systems analysis supplemented with the work of economists, economic historians, and political scientists that have highlighted the shifting terrain of states and global governance structures. World-systems analysis is an analysis of historical capitalism that has characterized all structures and social changes since the establishment of the Westphalian interstate system in the seventeenth century. According to world-systems theory, historical capitalism moves alongside "antisystemic movements" and new classes, categories of people, and nation-states emerge with differing relations to the capitalist world order. Communism was the institutionalizing of the antisystemic labor movement of the late nineteenth century, yet communism faced its own antisystemic movements as capitalism continued to create new classes through new differing relations of production. The framework of world-systems analysis is the most efficient model to treat the historical period I am examining; and as Beyer notes, world-systems scholars like Immanuel Wallerstein were the first to theorize globalization ("the entire globe as a single social

unit") as far back as the 1970's (Beyer 2006, 23).¹⁰ I will highlight the world-systems analysis model, how it understands the history of capitalism and its changes, and how it formulates anti-capitalist struggle in historical capitalism. The work of other scholars are brought in to give a validating account of the predictions that world-systems scholars have made. Leading world class economists and economic historians have written at great length on the challenges of capitalism today and see the present moment as a great turning point. They also highlight the ideologies of economic liberalism and how it operates in economic policy development in both individual states and global governance institutions.

If chapter 3 outlines the rise of the global capitalist world-system, the model with "no alternative," chapter 4 gives a history of the ideologies that were birthed in this unfolding. Conservative, liberal, and radical are three ideological stances that emerge and respond to the changes in the world-system. I outline how world-systems analysis sees these three ideologies and conclude the chapter with a treatment of Derrida's *Spectres of Marx* (1994). The literature that surrounded Derrida's long-awaited treatment on the subject of Marxism provides the history of the academy after the fall of the Berlin wall. Many economists and social scientists who hailed "the death of Marxism" in the 1990s have reversed their stance in light of the contemporary situation.

In chapter 5 I move into the third part of the thesis and begin the examination into the tradition of Catholic social teaching. By this point in the thesis, a historical framework has been

¹⁰ In Beyer's edited collection *Religion in the Process of Globalization* (2001), Beyer, Roland Robertson, and others move beyond world-systems analysis in their examination of religion and globalization. For the most part, their criticisms focus on the economically deterministic features of world-systems theory, that the theory is "not so much wrong as incomplete" in their view (Beyer 2001, *XV*). Robertson states that the extreme variety of world-systems theory leaves no place for religion as a force in history, but the "internal affairs of societies" (religion and culture) in this extreme model are situated as mere "epiphenomenal outcomes of shifts in the expanding economic structure of the international system" (Robertson 2001, 11). Yet as Frank Lechner notes in the same volume, "Although Wallerstein's work has been vigorously criticized on many substantive points, it still stands as the most influential 'model' of the world-system" (Lechner 2001, 69).

established (world-systems analysis) that gives a loose trajectory of the late nineteenth and twentieth centuries. Chapters 5 to 7 outline the evolution that Catholic social thought has taken in its relationship to liberalism. I trace these changes by way of a textual analysis of each of the major encyclicals identified with Catholic social teaching and review the literature by social scientists and theologians on the importance of each. I divide the analysis into three chapters, each corresponding to a rough time period.

Chapter 5 looks at the period between the nineteenth century to the end of World War II. This period is characterized by the Church's nostalgic attempts to establish a medieval restorationist social order, and I identify this as a reactionary period against liberalism. In its response to the "social question" of rising industrial capitalism, the Church begins its long advocacy for organized labour, the right to a just wage, but also grounds the right of private property in the new neoscholastic philosophy which emerges at this time. The Church develops a "third way" model of corporatism that aligns itself well with fascist governments in the first half of the nineteenth century.

Chapter 6 examines the *aggiornamento* with the modern world and the *rapprochement* with liberalism embodied in the Second Vatican Council. I identify this period as the progressive convergence with liberalism. The Church at this time takes up the liberal right of religious freedom, begins its strong advocacy of human rights internationally, and moves the "social question" to a global perspective. John XXIII and Paul VI open the Church up to democracy and at the end of this period even begin to democratize the Church itself. But in many ways, what looks like success is the beginning of problems.

Chapter 7 examines the papacies' of John Paul II and Benedict XVI. During this period the Church, in its fight against communism/socialism, continues its acquiescence to the American liberal model and endorses the American liberal economic model. I characterize this period as a postmodern conservative defense of American liberalism. This period is known, or will be known, as the Church's reversal or closing off to the democratic opening brought about in the last period.

The conclusion ties the thesis together by looking at Catholic social teaching as a response to the two waves of antisystemic movements. I also historicize the acquiescence of Catholic social teaching to liberalism through Naomi Goldenberg's theory of religions as vestigial states. The treatment of religions as vestigial states brings together the scholarship on religion and globalization, functional differentiation, and the "critical religion" scholarship on the constructed nature of differentiation in globalizing social systems.

2. Context of the Work: "The Francis Effect" and Wealth Inequality as an Emerging Category of Importance

In this chapter I will highlight some positive changes that have occurred in the last few years to show that we are at a turning point in the Church's relationship with liberal capitalism. The excesses of American-led economic development have begun to be radically questioned, and the older critiques of capitalism have re-emerged with ever new poignancy and drive (Casanova 1997, 126). Pope Francis has become perhaps the most important global figure speaking out against these excesses and contradictions of capitalist development, in the same way that his predecessor John Paul II was the preeminent world figure speaking out against the evils of the communist system. I will highlight some of the important changes that Francis has initiated and then move on to a brief treatment of some of the most widely publicized studies that have emerged since 2011 on the severity of the economic crisis, wealth inequality, political instability, tax avoidance, racial economic disenfranchisement, and the troubling resurgence of state and police repression. It is only after the ideological break that the year 2011 signalled that these studies were able to affect the public imagination. The issues raised in this chapter sets the context for the thesis, its relevance, and its importance for the field of religion and globalization.

2.1. The Reforms of Francis I

According to Austen Ivereigh's biography of Pope Francis (2014), Leonardo Boff's *Francis of Rome, Francis of Assisi* (2014), and Hans Küng's *Can We Save the Catholic Church?* (2013), Francis has instituted a number of changes which show a new direction for the Church in the third millennium. I will highlight eight major areas of change.

2.1.1. The Anti-Capitalist Rhetoric in the Apostolic Letter *Evangelii Gaudium* (2013)

Written as a treatise on Catholic Mission, Francis's first official writing as Pope caught headlines for its critique of capitalism. In the document he says "no to an economy of exclusion"

characterized by severe wealth inequality, stagnant social mobility, "throw away humans" in a "throw away culture", and ecological devastation coupled with the eviction of the poor and the indigenous from their lands (n.53). Francis states:

While the earnings of a minority are growing exponentially, so too is the gap separating the majority from the prosperity enjoyed by those happy few. This imbalance is the result of ideologies which defend the absolute autonomy of the marketplace and financial speculation. Consequently, they reject the right of states, charged with vigilance for the common good, to exercise any form of control. A new tyranny is thus born, invisible and often virtual, which unilaterally and relentlessly imposes its own laws and rules. Debt and the accumulation of interest also make it difficult for countries to realize the potential of their own economies and keep citizens from enjoying their real purchasing power. To all this we can add widespread corruption and self-serving tax evasion, which have taken on worldwide dimensions. The thirst for power and possessions knows no limits. In this system, which tends to devour everything which stands in the way of increased profits, whatever is fragile, like the environment, is defenceless before the interests of a deified market, which become the only rule (*Evangelii gaudium* n.56).

Evangelii gaudium also renounces the present financial system which "rules rather than serves" and an economy which lacks any real human purpose, but only worships a new manifestation of "the golden calf." Globalization is decried in the letter as merely the "globalization of indifference" linked to national economic measurements which hide poverty and inequality, and contain no way of measuring the common good (n.54). Importantly Francis links the rise of fundamentalism and violence to economic disenfranchisement and a Church that, in the past, has ignored its pastoral obligations to be inclusive and speak to the sufferings of people in their everyday struggles (n.63). And finally, most relevant to this thesis, Francis lambasts market fundamentalism and its ideological justification through trickle-down theories of economic growth, stating: "This opinion, which has never been confirmed by the facts, expresses a crude and naïve trust in the goodness of those wielding economic power and in the sacralized workings of the prevailing economic system. Meanwhile, the excluded are still waiting" (n.54).

I will return to these issues again and again throughout this thesis but particularly in Part Three where I outline the shifts in the tradition of Catholic social thought. Although Francis does not mention it in *Evangelii gaudium*, he is not only going against secular developments in economic globalization, but also the teachings of the last two Popes in how they altered the tradition to favor and at some points even advocate these market developments. The heavy process of citationality at work in formulating papal Church teaching erases the trace of these changes at the same time as it cites the works that came before. In this instance Francis is constantly citing the works of John Paul II and Benedict XVI in his apostolic letter, while ignoring how these Popes gave a partial Catholic theological legitimacy for these market ideologies.

Francis also reverts to the metaphor of the Church as "the people of God" throughout the document, the metaphor developed in the second chapter of Vatican II's *Lumen gentium* (The Dogmatic Constitution on the Church). This metaphor was scrapped by John Paul II and Cardinal Ratzinger during the 1986 synod of bishops. John Paul II and Ratzinger replaced the language of the people of God with "communion." I go into the details of this change further in chapter 5, but briefly, people of God implied democratic and liberationist tones in its applied ecclesiological trajectory. Communion, on the other hand, stresses unity, but most importantly, communion with Rome: recentralized authority and agreement with magisterial pronouncements.

2.1.2. Shaming Limburg's "Bishop of Bling" and the Demotion of Cardinal Raymond Burke

When the number of votes was reached making me pope, the Brazilian Cardinal Claudio Hummes came up to me, kissed me and said: 'don't forget the poor.' Immediately thinking of the poor, I thought about Francis of Assisi... Francis, the man of poverty, peace, who loves and takes care of creation, a man who gives out a sense of peace, a poor man. Oh! How I would love a church that was poor and for the poor! (Francis speaking to reporters in the Paul VI Hall, March 16, 2013).

Francis has personally made advocating a life of poverty a priority. This is shown in his rejection of the papal palace quarters for a humble apartment in the Vatican, his wearing of a simple iron cross instead of the traditional gold adornments, and in his choice of transportation. These personal choices have been widely reported in the media and have given his papacy a certain glow. Building on this popularity was his decision in his first year to publicly shame Lindburg's Bishop Franz-Peter Tabartz-van Elst for spending \$40 million on his bishop's palace. Dubbed the "bishop of bling" in the popular press, his public chastisement signalled a popular new direction for the Church hierarchy and has encouraged other bishops to give up their palaces and take up more modest residences. Bishop Tabartz-van Elst has since resigned his bishopric and is now working at the Vatican in the Pontifical Council for Promoting the New Evangelization.

The reorganization of top level clergy also shows that Francis is less tolerant of culturally divisive politics. Cardinal Raymond Burke, former Archbishop of St. Louis in the United States from 2003 to 2008, was one of the most virulent culture warriors on the American political scene. Serving as Cardinal Prefect to the Supreme Tribunal of the Apostolic Signatura (one of the highest positions in the Vatican second only to the Pope), he was demoted to the largely ceremonial position of Patron of the Sovereign Military Order of Malta after denouncing the interim report of the 2014 synod on marriage and the family. Although rumours of his upcoming demotion were circulating before the synod, his reaction solidified the understanding that divisive figures like Burke needed to be marginalized in the Church. Burke has given numerous interviews expressing his views on a number of issues: he attributes the falling numbers in ordinations to the "feminization of the Church", the influence of radical feminism, and the presence of female altar servers; he holds that the Church can never talk enough on the issues of

abortion and same-sex marriage; and for the purposes of this thesis, Burke is also an American market fundamentalist, telling reporters that *Evangelii gaudium* should have dealt more with abortion and that he does not think the document was meant to be an official contribution to Church teaching.

2.1.3. The Case for the Canonization of Archbishop Óscar Romero of San Salvador

No soldier is obliged to obey an order contrary to the law of God. No one has to obey an immoral law. It is high time you recovered your consciences and obeyed your consciences rather than a sinful order. The church, the defender of the rights of God, of the law of God, of human dignity, of the person, cannot remain silent before such an abomination. We want the government to face the fact that reforms are valueless if they are to be carried out at the cost of so much blood. In the name of God, in the name of this suffering people whose cries rise to heaven more loudly each day, I implore you, I beg you, I order you in the name of God: stop the repression (Óscar Romero's Last Sermon, March 23, 1980).

Romero represents a clear case for Catholic martyrdom, yet his canonization was delayed for almost 20 years under John Paul II's papacy in a move that some have said was due to the Pope's reluctance to uplift one of liberation theology's most influential converts. Assassinated the day after giving the above cited speech, Romero was a vocal defender of the indigenous farmers and poor who were targeted by right-wing death squads unofficially linked to the US backed military Junta (JRG) and their "anti-communist" reforms. The anti-communist reforms that took place in the Latin American context of this period characteristically took the form of targeting labor unions, students and academics, rural land reform organizations, and religious clergy. I address the situation of liberation theology and Latin America in detail in chapter 6 and 7.

For now it is important to note that many believe that Romero's canonization was postponed for political purposes; and that it was Benedict XVI, going as far back as when he was the head of the Congregation for the Doctrine of the Faith (CDF), who blocked any institutional

advancement on his beatification. Almost as soon as taking office, Francis made it a priority for the Congregation of the Doctrine of the Faith to hurry the process. The main theological stumbling block seems to be whether Romero was martyred for being a Christian or for being a leftist and advocate of liberation theology during El Salvador's civil war (1979-1992).¹

2.1.4. An Encyclical on Climate Change: *Laudato Si* (2015)

Although Benedict XVI's *Caritas in veritate* (2009) mentions environmental devastation, it blames its causes on what Benedict says is "the culture of death" which characterizes our sinful humanity: abortion, gays, and euthanasia. And he advances the case for a "universal prolife ethic" as the necessary cure for environmental degradation. Benedict's argument and ultimate concerns were summarized in a confusing speech delivered at his 2008 end of year address to the Curia. To many this speech is considered one of the worst blunders of his papacy, and news sources widely reported that he stated that heterosexuality is just as important to protect as the rainforest. Vatican sympathizers gave a defense which has come to characterize their response to all his public relations debacles: that he is a very smart academic theologian whose message is not easily translated into convenient sound bites. What he did say in that speech was that the Church "should also protect man from the destruction of himself [referencing academic gender theories that he earlier said seek to unnaturally free humans from the creator's design] an ecology of man is needed... The tropical forests do deserve our protection. But man, as a creature, does not deserve any less."²

¹ "Archbishop Romero's beatification will be soon, archbishop says." Catholic News Service, February 4, 2015; accessed February 20, 2015, <http://www.catholicnews.com/data/stories/cns/1500520.htm> . In this article archbishop Vincenzo Paglia of the Congregation for Saint's Causes discusses past prejudices against Romero and the stalling in the process of recognizing his clear case of martyrdom by Benedict XVI and a number of other clergy accusing him of being a radical and siding with the condemned theology of liberation.

² "Pope says saving heterosexuality like saving the rainforest." Reuters News, December 22, 2008; accessed February 22, 2015, <http://blogs.reuters.com/faithworld/2008/12/22/pope-says-saving-heterosexuality-like-saving-the-rainforest/>.

Francis' encyclical, on the other hand, links climate change to the economic model of advanced or late capitalism: "An economic system centred on the god of money needs to plunder nature to sustain the frenetic rhythm of consumption that is inherent to it... The monopolizing of lands, deforestation, the appropriation of water, inadequate agro-toxics are some of the evils that tear man away from the land of his birth."³ Of great significance is that he worked closely with Brazilian theologian Leonardo Boff on the drafting process. Boff was one of the most famous targets of the CDF's attacks against liberation theology, being officially silenced for a number of years. Benedict XVI, then Cardinal Joseph Ratzinger, was the one who personally met, interrogated and later silenced Boff. Naomi Klein was invited to a conference at the Vatican to discuss the encyclical's method and impact. She states that the encyclical's method comes out of a global south analysis which highlights the connections of global structural injustice between developed and developing worlds, climate change, and capitalism.⁴

2.1.5. An Authentic Pastoral Tone Towards LGBT Catholics

When the American Conference of Catholic Bishops released *Always Our Children: A Pastoral Message to Parents of Homosexual Children and Suggestions for Pastoral Ministry* (1997), it was chastised by the Congregation for the Doctrine of the Faith for independently issuing a local document on moral teaching. As the title suggests, *Always Our Children* advocated against parents disowning or kicking out their LGBT children, while affirming the Church's stance that homosexuality is not a sin, but homosexual acts are. Changes were made and the document was revised in 1998. While the previous version suggested to parents not to

³ "Pope Francis' edict on climate change will anger deniers and US churches." *The Guardian*, December 27, 2014; accessed February 21, 2015, <http://www.theguardian.com/world/2014/dec/27/pope-francis-edict-climate-change-us-rightwing>.

⁴ "Naomi Klein on Visiting the Vatican & the Radical Economic Message behind Papal Climate Encyclical." *Democracy Now*, August 4, 2015; accessed July 10, 2015, http://www.democracynow.org/2015/8/4/naomi_klein_on_visiting_the_vatican

assume their child's sexual orientation based on their own anxieties and suspicions, but should "wait and see;" the revised document counselled against this hands-off approach stating that certain levels of parental intervention were always called for to protect the child from evil acts. Other changes were also made to make sure that the Church's stance on homosexuality was clear and not in the least bit vague or pastoral.

Ratzinger's CDF document *On the Pastoral Care of Homosexual Persons* (1986), was another such document that was particularly shunned by moderates and progressives, leading many to ask the question: what constitutes "pastoral" to Joseph Ratzinger? San Francisco's Archbishop John Quinn was forced to respond to the outrage by certain segments in his diocese by issuing a statement that "intrinsically morally disordered" is "philosophical language" and not to be taken personally (Quinn 1988) — another example of needing to provide an academic veneer to Ratzinger's (publicly perceived) intolerance.

While it is clear that Pope Francis is in no way altering Church teachings on gay marriage or homosexuality, his record as pope shows the appeal of being pastoral. Since his statement on the plane back from Brazil in 2013 that "if someone seeks God... who am I to judge," he has been named *The Advocate's* and *Time* magazine's Person of the Year. While Ratzinger paid lip service to the teaching that all were welcomed in the Church and that homosexuals themselves are not evil, he has not shown compassionate action to affirm those sentiments; he has only ever engaged in the politically divisive politics of culture war. Francis, on the other hand, has said "The Catechism of the Catholic Church explains this very well. It says one must not marginalize these persons, they must be integrated into society. The problem isn't this (homosexual)

orientation — we must be like brothers and sisters."⁵ As Leonardo Boff comments: "[t]hanks be to God, Pope Francis presents himself openly as a pastor and not as a doctor or theologian..." (Boff 2014, 79).

2.1.6. An End to the Attack on the Works of Women Religious

When the moral authority of the hierarchy is hemorrhaging due to financial scandals and many bishops who ... cover up sexual abuse of children, a cover up that continues in some quarters to this day, and thousands are drifting away from the church ... the waste of time on this investigation is unconscionable (Sister Elizabeth Johnson in an acceptance speech to the Leadership Conference of Women Religious after receiving their top award, Nashville, August 15, 2014).

In 2008 the CDF launched an investigation into the Leadership Conference of Women Religious (LCWR), stating among other things the CDF's concern over the priority the organization gives to issues of social justice over those of the Church's sexual teachings. In 2012 more criticisms were leveled against the LCWR, stating that the organization and American sisters in general were promoting feminist theology and new age spirituality. These investigations launched under Benedict XVI were apparently the result of American Catholic conservative leaders constantly reporting the activities of the LCWR to the CDF, conservatives who found a sympathetic ear in Rome. As a result a number of disciplinary measures were to take place, the harshest of which was the appointment of Seattle's Archbishop Peter Sartain to oversee and censor all activities of the group, an incredible insult to highly educated and active women. The process initiated in 2008 includes two reports, the first of which came out in December 2014. The report's tone was markedly different from past Vatican responses under Benedict. The report praised the invaluable work of the sisters and called for dialogue that in the future be based on mutual respect. The second report ended the investigations and continued the positive tone of the first, thus ending the attacks.

⁵ "'Who am I to judge?' Pope's remarks do not change church teaching." Catholic News Service, July 31, 2013; accessed February 22, 2015, <http://www.catholicnews.com/data/stories/cns/1303303.htm>.

The Catholic sisters have gained immense popularity in the US over the past few years. One of their greatest achievements was the work of Sister Simon Campbell's organization and lobbying group NETWORK. In 2012 they launched the "Nuns on the Bus Campaign," touring America to bring attention to Paul Ryan's conservative budget. Ryan famously said his budget reflected his Catholic faith, while the Sisters alongside the United States Conference of Catholic Bishops disagreed. The success of the "Nuns on the Bus" campaign won Sister Simone Campbell a speaking slot at the 2012 Democratic National Convention and helped bring to the American public's attention the sisters' struggle with the Vatican over their social justice work. It was clear that a significant proportion of everyday Americans loved the social justice message of the sisters and preferred that work over the divisive culture war ethos of conservative sexual politics. This difference, between sexual politics and social justice, has also been a defining character of Francis' papacy so far. Rightly or wrongly, the public perceives a shift in the Catholic Church which has garnered the institution a level of popular support not seen in generations.

2.1.7. The 2014 and 2015 Synods on the Family and *Amoris Laetitia* (2016)

Greed for money and power. And to satisfy this greed, evil pastors lay intolerable burdens on the shoulders of others, which they themselves do not lift a finger to move (Pope Francis in his homily at the opening mass of the Synod on the Family, 2014).

This opening statement contains a condemnation of the sexual politics that have divided Catholic families: that conservative Catholic leaders place too much importance on these issues at the expense of social justice and as a result have unduly burdened everyday Catholics. The address to the Synod by Romano and Mavis Pirola, directors of the Australian Catholic Family and Marriage Council, also highlights this point. They told the story of three families: of a divorced mother of two who has been a pillar of support to her Church community, of a Catholic

family wanting to welcome their gay son and his partner home for Christmas, and the story of an elderly widow who is the sole caregiver for her disabled adult son. These stories further the observation that what tears families apart is not individual sexual sin, but the Church's response to people's complex lives. The couple noted: "The Church constantly faces the tension of upholding the truth while expressing compassion and mercy... However, more than anything [the families] need to be accompanied on their journey, welcomed, have their stories listened to, and, above all, affirmed."⁶

The two meetings have culminated into Francis' second apostolic exhortation, *Amoris laetitia* (The Joy of Love) (2016). Two important shifts emerge in the letter. First, Francis prescribes local solutions and responses to the challenges churches face in the family lives of their parishioners. This brings the Church back to the democratization that was a feature of the immediate post-Vatican II Church, reversed under John Paul II's centralization. Second, the difficulty of achieving the family, or family stability, is attributed to the structural and economic conditions in which humans find themselves. This echoes Pius XI's statement in *Quadragesimo anno* (1931) that industrialization and its resultant urbanization lead to unstable families and "imperils human morality" (n.135). Again this linkage — between economics and family life — was downplayed in John Paul II's theology. *Amoris Laetitia* represents a move away from John Paul's "personalism," which stresses morality within an individual framework; or to put it more complexly, modern immorality is the result of individual acquiescence to the "culture of death," which is not the structural injustice of capitalism, but the immorality of individualism (sometimes linked to capitalism in his social encyclicals).

⁶ "Married couple tells Synod Fathers that 'family life is messy.'" Official Vatican Network, October 7, 2014; accessed February 22, 2015, <http://www.news.va/en/news/married-couple-tell-synod-fathers-family-life-is-m>.

2.1.8. Reforming the Vatican Bank

The Institute for the Works of Religion (IOR), commonly called the Vatican Bank, was mired in scandal in the last years of Benedict XVI's reign. The organization was placed on a watch list by the US government in late 2010 after revelations that the Italian mafia and South American drug cartels were using the small institution in their international money laundering activities. Like HSBC and other global financial firms, the Vatican Bank was also engaged in transnational financial schemes and other illegal activity. Francis in the first year of his reign famously declared that if we can't reform it, we will disband it; and hired world renowned financial transparency experts to restructure the institution. Although initially the bank's assets fell dramatically, they are back on pace and making modest and sustained growth.⁷

These eight areas of transformation show a hopeful shift in Church policy towards the issues that are affecting not only Catholic families, but all peoples around the world. Furthermore these changes signal a hopeful shift in that the Church has the possibility of becoming a global voice against elites that have gone too far in their self-serving economic policies and the subsequent inequality and poverty that has resulted. I highlight these Catholic transformations to show that changes are not only possible, they are happening. However, this thesis is not primarily about Francis, but the historic shift towards liberalism in the tradition of Catholic social thought. The next section outlines the present context of liberal capitalism by focusing on some of the most widely publicized studies and events that have altered the public's imagination, particularly in America, on the growing divide between rich and poor, and what such inequality signals to the ideas of democracy and development. Again, this section provides

⁷ "How Pope Francis Turned Around Troubled Vatican Bank." CBS News, September 25, 2015; accessed February 8, 2016, <http://www.cbsnews.com/news/how-pope-francis-turned-around-troubled-vatican-bank/>.

a backdrop for the remainder of the thesis, particularly chapters 3 and 4, where I tackle the development of the world-system of historical capitalism.

2.2. Public Awareness After Occupy

We are living in the world Occupy made! (Dan Cantor, executive director of the Working Families Party, on the election of New York Mayor Bill De Blasio in 2013).

It is a commonly held view that before 2011 it was almost impossible to discuss issues of class in the American political context. Allegations of "class warfare" were levelled against those in academia, politics, or civil society who sought to address issues of rising inequality, particularly if they sought to address these issues in connection to economic policy developed since the Ronald Reagan and Margaret Thatcher era. Ideological justifications for tax breaks for the rich and the cutting of social services — which were derided as "enabling" the lazy poor — abounded in the US political discourse, but these ideologies and discourses have been exported to other societies as well. Statements like "a rising tide lifts all boats" helped enable economic policies which focused on growth at the expense of a model that would balance or couple economic growth with the redistributive mechanisms of progressive taxation. The policies of central banks across the world, beginning in the 1970s, also reflect this shift; this shift is shown in their changing mandate towards a sole focus on adjusting interest rates to target inflation over their older commitments to both achieving low inflation through interest rate adjustment and achieving full employment. In chapter 3 I treat in detail the economic developments attributed to globalization. For the purposes of this chapter, establishing the context of the thesis, I highlight a few significant events and widely publicized studies. It is clear that income inequality and class difference has become, once again, a major category of analysis in the public discourse, something that has not been on the radar for nearly thirty years.

2.2.1. General Figures on the Severity of Inequality

A number of figures have become popular in the public imagination. The most famous statement is, of course, the main slogan of Occupy Wall Street: "we are the 99%," coined by Yale anthropologist, activist, and anarchist David Graeber, one of the main organizers of the movement. It is important to distinguish between wealth, what a household/individual owns in assets, investments, property, etc.; and income, the percentage of annual GDP that an earning category grabs in a single country. According to Inequality.org, a project of the Institute for Policy Studies, the 400 richest Americans own the wealth equivalent to the bottom 150 million. There is also the recent revelation that the six heirs to the Walton fortune (Wal-Mart) own wealth equivalent to the bottom thirty percent of Americans.⁸ These numbers are actually not as stark as they sound since one in four Americans owes more than they own; but this is also a problem and reflects another widely cited statistic that the bottom half of American households have actually seen their wages decrease since the late 1970's when adjusted for inflation. The work of Elizabeth Warren during her period as bankruptcy expert at Harvard Law School — particularly in her books *The Fragile Middle Class* (2001) with Teresa A. Sullivan and Jay Lawrence Westbrook, and *The Two-Income Trap* (2004) with Amelia Warren Tyagi — shows how access to credit during the period between 1978 to 2008 came in to compensate for stagnant wages. This was also a time when two incomes became a necessity for keeping a household afloat. I discuss Warren's work later on in this chapter and in chapter 3.

In terms of income distribution we find that prior to the 1980's the wealthiest one percent took home around nine percent of US earnings, while in 2010 they took home twenty-four

⁸ "6 Waltons Have More Wealth than the Bottom 30% of Americans." *Forbes*, December 14, 2011; accessed February 20, 2015, <http://www.forbes.com/sites/timworstall/2011/12/14/six-waltons-have-more-wealth-than-the-bottom-30-of-americans/>. See also, "Wal-Mart Heiress' Art Museum a Moral Blight: Jeffery Goldberg." *Bloomberg Business*, December 12, 2011; accessed February 22, 2015, <http://www.bloomberg.com/news/articles/2011-12-13/wal-mart-heiress-s-museum-a-moral-blight-commentary-by-jeffrey-goldberg>.

percent. America is often taken to be ground zero for these trends, but they are being replicated in almost all countries now, from Ghana to Germany. Still, some countries have actually engaged on a policy campaign to reduce inequality, most notably Brazil. According to Joseph Stiglitz, Nobel laureate, past Chief Economist at the World Bank, and former Chair of the Council of Economic Advisors to the Clinton Administration:

Economists long ago tried to justify the vast inequalities that seemed so troubling in the mid-19th century—inequalities that are but a pale shadow of what we are seeing in America today. The justification they came up with was called “marginal-productivity theory.” In a nutshell, this theory associated higher incomes with higher productivity and a greater contribution to society. It is a theory that has always been cherished by the rich. Evidence for its validity, however, remains thin. The corporate executives who helped bring on the recession of the past three years—whose contribution to our society, and to their own companies, has been massively negative—went on to receive large bonuses. In some cases, companies were so embarrassed about calling such rewards “performance bonuses” that they felt compelled to change the name to “retention bonuses” (even if the only thing being retained was bad performance).⁹

"Capture at the top" is one phrase which helps emphasize this staggering increase of wage compensation for top-level earners, the super rich sometimes referred to as High Net Worth Individuals (HNWI's). CEO compensation has increased 937 percent since the 1970's according to a June 2014 report by the Economic Policy Institute, entitled "CEO Pay Continues to Rise as Typical Workers are Paid Less."

Top administrators in universities have also seen a disproportionate rise in their pay. Liberal political scientist Amy Gutmann, who edited the 1994 *Multiculturalism: Examining the Politics of Recognition*, which included essays by such distinguished people as Charles Taylor, Jürgen Habermas, and Anthony Appiah, makes a little over \$3 million a year as president of Penn State University, the second highest paid university president in the US. A number of

⁹ "Of the 1%, by the 1%, for the 1%." Vanity Fair, May 2011; accessed February 20, 2015, <http://www.vanityfair.com/news/2011/05/top-one-percent-201105>.

publicized events and protests brought the issue of overpaid top administrators to the fore. Raymond Burse, president of Kentucky State, took a voluntary pay cut of \$90,000 to increase the wages of all support staff and food service employees from the minimum wage of \$7.25 to \$10.25/hr. In Canada there was the protest application of 4 professors for the position of President at the University of Alberta; the point was to raise the issue, albeit in a humorous way, that the professor's 4 combined salaries was as much as the starting position for the administrator at \$400 000.

In an era of low regulation and oversight of top positions — indeed, CEOs often design their own compensation packages, and sit on the boards that approve them — we have a situation which some have referred to as nothing less than the looting of the institutions they are running; in short, they can pay themselves what they like in a climate which sees CEOs and presidents as magic makers who bring exponential value to the company. This compensation of CEOs reached embarrassing levels in the year of the financial crash, when bankers were still paying themselves multimillion dollar performance bonuses even as the economy went into crisis. This belief in the magic-making abilities of chief executives is not wholly flawed, since stock prices and investments do fluctuate when CEOs are appointed. This has been referred to as the "superstar effect," which recognizes that there is a certain celebrity appeal of successful business leaders which bring substantial market confidence to an institution when they are hired on.

On global inequality Thomas Piketty states:

global inequality of wealth in the early 2010s appears to be comparable in magnitude to that observed in Europe in 1900-1910. The top thousandth seems to own nearly 20 percent of total global wealth today, the top centile about 50 percent, and the top decile somewhere between 80 and 90 percent. The bottom half of the global wealth distribution undoubtedly owns less than 5 percent of total global wealth (Piketty 2014, 438).

The latest authoritative report on the issue of global inequality is OXFAM's "Even It Up" (2014), which brought the topic of inequality to the World Economic Forum in 2015 at Davos. The report concluded that the eighty-five richest people own more than the bottom four billion: "between March 2013 and March 2014, these 85 richest people grew \$668m richer each day" ("Even It Up," 6). Yet even though a universal problem is recognized, the private-public alliances (partnership between business elites and politicians), which these groups claim will be the solution to the issues, have not led to any change in the trend. Indeed, wealth inequality has been a focus of the Davos meetings for the last four years and it unfortunately shows, like the annual UN Climate Change Conferences, that either the solutions that are being proposed or the models being advanced, are not adequate.

2.2.2. The Princeton Inequality Study

The central point that emerges from our research is that economic elites and organized groups representing business interests have substantial independent impacts on U.S. government policy, while mass-based interest groups and average citizens have little or no independent influence. Our results provide substantial support for theories of Economic-Elite Domination and for theories of Biased Pluralism, but not for theories of Majoritarian Electoral Democracy or Majoritarian Pluralism (Page and Gilens 2014, 565).

Reported in the media as simply "The Princeton Inequality Study," "Testing Theories of American Politics" (2014) by Martin Gilens and Benjamin I. Page have given fuel to the idea that America is no longer a democracy but has become an oligarchy (rule by the rich) or plutocracy (rule for the rich). By examining the outcomes of over 1500 policy debates over the last thirty years, they find that average citizens (or "median voters") and mass-based interest groups (consumer protection groups, environmental advocates, civil rights organizations) have little sway in policy outcomes. By contrast, business lobby groups and rich elites sway policy outcomes in their favor and dominate the policy process. What makes this study possible for the

first time is a unique data set compiled between 1981 to 2000 by Gilens. Although they state that there might be initial flaws in their first attempt ("even though our findings probably understate the political influence of elites..." [573]), the report is meant as a beginning to show that such studies, and the measurements they use, are indeed possible.

In his work *Supercapitalism* (2007), Robert Reich, former Secretary of Labor under the Clinton Administration, shows that regulatory policy in the US, although publicly espoused to be helping consumers, is more about inter-industry rivalries than protecting consumers. In an economic-elite-dominated political arena, regulatory policy processes have become a battleground for business and industry to enact policies that favor the highest bidder over their competitors. For example, the American auto industry was able to keep foreign competition out of the American market for years under the guise of consumer protection and protecting American workers. When coupled with the Princeton inequality study, Reich's work reveals a political arena that has been hijacked by business, financial, and industry interests which have little if anything to do with the concerns of everyday citizens. As the crisis of predatory lending has shown, average citizens are targeted and negatively affected by this legalized extortion, and financial lobbying power is effective in keeping these harmful practices on the books, or even illegal practices from being investigated.

Another famous and widely publicized study, "The Democracy to Which We Are Entitled" (2013) by Timothy Kuhner of Georgia State University, shows that the only difference between corruption in the developed world and corruption in the developing world, is that in the developed world corruption has been made legal through various elite serving legislative adjustments. The repealing of campaign finance laws, better known as the "Citizen's United" Supreme Court ruling, is probably the most emblematic example. These studies argue that

Washington has become merely another field for corporations to battle over market share and strategically lobby for regulations that give them a competitive edge over their rivals. Anti-trust legislation and intellectual property rights are two further areas where businesses fight each other for competitive market sway, dragging the legislative process into their inter-industry rivalries, wasting tax money, the time of legislators, and evicting access to government by citizens.

2.2.3. The Berkeley Rich Studies

How different are the rich from the rest of us? This is the question that a series of studies coming out of UC Berkeley attempts to address, and finds that for the most part the rich are pathologically uncaring for others and take selfishness to destructive "anti-social" levels. The strata of lower earners retain more "prosocial" behaviors such as generosity, charity, equality, and compassion. People from higher earning social classes tend to be more individualistic, cut-throat, and even thieving (literally taking candy from children in one of their more humorous studies) justified by what the researchers call market fundamentalist attitudes. These studies represent the largest collaboration of scholars on the subject, and they have been regularly publishing their results in academic journals. Dacher Keltner, Rodolfo Mendoza-Denton, Paul K. Piff, and Michelle Rheinschmidt of the University of California, Berkeley; Stéphane Côte, and Bonnie Hayden Cheng of the University of Toronto; and Michael W. Kraus of University California, San Francisco are some of the main scholars working on this project.

In "Social Class, Solipsism, and Contextualism" (2012) the researchers review the literature in the field and outline nine theoretical hypotheses that the research in all past studies on class difference has validated. One main difference is that people of lower socioeconomic backgrounds have developed traits which nurture community as a system of mutual support, while people from higher socioeconomic backgrounds tend to see relationships with others

within a cost-benefit framework: "what am I getting out of this", even in marriage contexts. Furthermore, lower earning classes tend to have a social constructionist view of society wherein people, regardless of individual ambition, are subject to the larger social forces that shape their lives. People from higher earning backgrounds tend to be "solipsistic" and view people's positions in society as an issue of individual motivation and personal morality. Hence a major feature of the disposition of market fundamentalism is structurally rooted in class difference: the idea that everyone can make it if they work hard. The level at which such ideals influence society as a whole, and the influence such discourses have on politics, signals the hegemonic hold that the rich class has gained in shaping public opinion through its privileged access to state power and the culture industry. The review states:

More specifically, we have detailed three hypotheses and accompanying empirical evidence showing that contextualist tendencies of lower-class individuals heighten empathetic accuracy [the ability to accurately interpret other people's emotions that the research tested in laboratory settings] and the attunement of others' emotions, contextual attributions, and the espousal of social constructivist theories about social categories. In contrast, solipsistic tendencies of upper-class individuals decrease empathetic accuracy, elevate dispositional attribution tendencies, and amplify essentialist beliefs [views that poor people and even different races are incapable of achieving success because of their own inherent failings] (Kraus et al. 2012, 557).

Some of the tests that the researchers carried out were quite revealing. These are highlighted in "Higher Social Class Predicts Increased Unethical Behavior" (2012) and "Having Less, Giving More: The Influence of Social Class on Prosocial Behavior" (2011). I will highlight only three of the tests. First was a simple and quick test in which researchers observed courtesy crosswalks in Los Angeles and found that luxury cars rarely, if ever, stopped for pedestrians. Second, the humorous one I mentioned earlier, involved participants in a waiting room waiting for an interview, while what was actually being observed was their actions in the waiting room. Participants were left alone in the waiting room with a bowl of candy and told to

help themselves, but that the candy was for a group of children who have the space booked after the interviews. Lower-class individuals for the most part left the bowl alone or took one candy. Absolutely shocking was that not only did upper-class individuals eat as much as they wanted, but some even emptied out the entire bowl in their purses or bags; again, literally stealing candy from children!

A third study didn't involve different classes per se, but measured how privilege in general affects people's disposition and beliefs. Undergraduate students were asked to play a game of monopoly in pairs. Before the game began, the flip of a coin determined who was going to be the disadvantaged player and who was going to be the privileged player. The disadvantaged player could only roll one die (hence no possibility of rolling doubles) and did not collect \$200 for passing "Go." Both participants knew from the beginning that it was impossible for the privileged player to lose; yet as the game went on, the advantaged player became ruder, more demanding (ordering his/her money), and annoyingly self-congratulatory. The interviews conducted after the game posed questions about whether or not the privileged players believed that they deserved to win and found that even though they knew full well that the game was rigged (they could in no way lose), the feeling of winning triggered a sense of entitlement, and a strong belief that they deserved to win.

2.2.4. Fast Food Sector Strikes and Three Studies

2013 saw for the first time massive coordinated strikes and walkouts in the fast food service industry. Public support was huge and organizers and striking workers were invited on popular media outlets such as the *Colbert Report* and *The Daily Show*. Union organizing in the service industry has been described as the most important struggle for the labor movement in America today. Furthermore, it is one of the only sectors that cannot be off-shored. Yet even in

this industry, owners have threatened to automate jobs if the employees successfully unionized, or if the unrest were to continue. The slogan "we can't survive on 7.25" has been the rallying cry for a new push to increase the federal minimum wage to \$15/hr in the US.

At the height of the strikes in October and November 2013 came two reports which showed that taxpayers inadvertently pay for the low wages of fast food workers, who heavily rely on government anti-poverty programs, and also that the state is subsidizing the high compensation of the CEOs of these companies. In "Fast Food, Poverty Wages" (2013) The UC Berkeley Labor Center calculated that fifty-two percent of nonmanagerial front line workers are on one or more government assistance programs, as compared to twenty-five percent of all workers nationwide. These programs include Medicaid, Children's Health Insurance Program (CHIP), the Federal Earned Income Tax Credit (EITC), the Supplemental Nutrition Assistance Program (SNAP or "food stamps"), and Temporary Assistance for Needy Families (TANF). The study shows that for the fast food sector alone, government is subsidizing over \$7 billion a year for these low wage jobs. Even at full-time hours, half of those working forty hours a week are enrolled in a public assistance program.

In "Super-Sizing Public Costs" (2013) the National Employment Law Project takes the UC Berkeley numbers and compares them to the profits and compensation packages of the most successful fast food companies. The seven top companies — McDonald's, Burger King, Yum! Brands (Pizza Hut, Taco Bell, and KFC), Wendy's, Dunkin Donuts, Sonic, and Domino's — made a total in 2012 of \$7.44 billion in profits, paid their CEOs \$52.7 million, and awarded another \$7.7 billion in dividends and stock buybacks.

Responding to the usual market fundamentalist reaction against demands for an increase to minimum wage — like employers will be "forced" to fire people, that inflation will rise, or that it will hurt small business or family restaurants — Anrindragit Dube, T. William Lester, and Michael Reich in "Minimum Wage Shocks, Employment Flows, and Labor Market Frictions" (2014) show that for a mere 4¢ increase on the price of a fast food meal, or an 8¢ rise in the price of a family restaurant entrée, employers can easily pay \$15.00/hr. In a county by county comparison they also found that increases in minimum wages increases demand by increasing the base of consumer expenditures, which fuels the economy. Most of the economists I cite in chapter 3 see the economic crisis in terms of a lack of consumer expenditures. As mentioned earlier, average citizens have not seen a significant pay increase in thirty years and this has affected demand. Furthermore, in their county to county comparison they found that employment rates actually increased when there was a minimum wage increase, while inflationary effects were practically non-existent. In a hearing before the Senate Committee on Health, Education, Labor, and Pensions, Dube countered all the claims made by Restaurant Industry lobbyist Mr. Rutigliano, who went from the humble argument that he represents "small family restaurants" and that they would be hit harder than McDonalds (which was disproved in the study), to the apocalyptic warnings about inflation: that a slight minimum wage increase would destroy the whole economy by bringing about surging price increases, a point also disproved in the study.

2.2.5. The Troubling Prevalence of Financialization in Late/Advanced Capitalism

That total value of outstanding derivatives stood at \$600 trillion (more than ten times the value of global GDP) before the crisis exploded in 2008, and then it dipped briefly before rising again. By 2012, a few years after that very costly event that brought down firms, governments, and whole economies, it had risen to over \$800 trillion, and by early 2013 it had reached more than \$1 quadrillion... In contrast global GDP actually fell sharply from \$55 trillion in 2007 to \$45 trillion in

early 2008, reflecting the crisis in the economy. The power of finance, and what makes it dangerous, is its capacity to build up its own value even as households, economies, and governments lose value... In this regard finance can be thought of as a capacity to securitize just about everything in an economy and, in doing so, subject economies and governments to its own criteria for measuring success (Sassen 2014, 117-118).

The world-systems analysis framework that forms the basis for Chapter 3 of this thesis shows that there is actually nothing new about this level of financialization. In the past two capitalist world hegemonies, first the Dutch and then the British, decline in influence was followed by, or began with, a huge rise in finance. In both historical instances, and what we are seeing this time with the American hegemon, finance facilitated a huge transfer of wealth to the top portion of elites in society. Briefly stated, this huge transfer forecloses the legitimacy of the global hegemon because the elites that govern cannot validly show that their interests are in everyone's interest; rising hegemonies, in the world-systems model, gain their prominence in periods of great business and trade expansion, when growth is distributed not equally but enough to give a large majority a decent life. This birth of a larger middle class provides the ideological legitimacy, a popular basis of support, and quells unrest. In the late phases of hegemonic cycles huge transfers of wealth make their way to the top as elites become disengaged from the societies they are a part of; finance is the tool that facilitates this transfer, and austerity or structural adjustment is the economic policy that forces a country to prioritize debt servicing for the benefit of financial firms.

Before the financial crash of 2008 it was widely reported that financial firms were hiring astrophysicists to conjure up their derivative formulas, such as the now infamous credit default swaps (CDSs). David Graeber recalls this period:

Even a lot of academics fell for it. I well remember going to conferences in 2006 and 2007 where trendy social theorists presented papers arguing that these new

forms of securitization, linked to new information technologies, heralded a looming transformation in the very nature of time, possibility — reality itself. I remember thinking: 'Suckers!' And so they were (Graeber 2012, 15).

We will return to finance and austerity in chapter 3, but for now it's important to highlight that since the 1980's a trend towards financialization in the economy has taken place that has seen a decline in older forms of productive economic activity such as manufacturing and agricultural. Debt is the bridge which connects households, municipalities, other businesses, and governments to these financial institutions, and new complex formulas transform these debts into financial products that are then traded on global markets. Hence the subprime mortgage crisis of 2007 led to the financial crash of 2008. It did not matter if the people who took out the mortgages could pay them as it was not about making money as traditional banks did, that is, off of the mortgage payments and interest. It was about constructing with the mortgage contracts an asset-backed security (a financial product in high demand in the mid 2000's), which could then become a source of profit on the high-level investment circuit. These asset-backed securities were given triple A credit scores (the highest score) by the rating agencies — Mooney's, Standard and Poor's, and Fitch — and sold to investors all over the world, investors which included trade unions in France and the Ontario Teacher's Pension Fund.

Financialization describes the process in which traditional economic interactions — like a mortgage contract between a bank and household — are transformed into a financial product that can be bought and sold on global financial markets. Government bonds, household credit card debt, municipal infrastructure projects, foreign currency exchanges, and traditional businesses all become areas that can be invaded by finance. Furthermore, the regulations that were put in place after the crash in no way seek to curb these excesses — such as reinstating a version of the New Deal era Glass-Steagall Act that was dismantled in 1997 — but merely places modest capital

requirements on financial institutions, as seen in the Dodd-Frank bill and similar policies like those advocated by Mark Carney, past chair of the Bank of Canada and now chair of the Bank of England. Even these modest reforms have been heavily eroded by the power of finance industry lobbying.

2.2.6. Tax Avoidance and the Starbucks UK Scandal

The issue of tax revenue is gaining popular ground and a number of grassroots organizations have emerged that are building campaigns targeting what they see as corporate tax dodging. This comes at a time when governments are threatened with insolvency, and "balancing the budget" becomes a masked ideological catchphrase for dismantling the welfare state through cutting back Keynesian era anti-poverty programs and public services discursively derided as "entitlements." These groups, which include The Global Tax Justice Network and the Uncut movement, see the issue of government deficits not as one of overspending but as a loss of revenue through tax avoidance.

Tax avoidance differs from outright illegal tax evasion and is characterized by companies which use accounting loopholes in national tax codes and/or utilize certain dynamics available through globalization, such as setting up subsidiaries in other nations to hide their profits. This is how Starbucks in the UK was able to pay \$0 dollars in corporate taxes between 2008 and 2012; it set up a subsidiary in The Netherlands from which it "bought" products totalling all of its company's profits. Hence it was able to claim it made no profits those years. The public outrage in Britain was massive and included protests in front of Starbucks locations. Yet even in 2013 when it finally paid \$5 million in the first half of that year, it was described by the company in terms of hearing their customer's concerns, not that a company is obligated to pay taxes to a country in which it operates. Despite sales of over \$3 billion between 2011 and 2014, Starbucks

UK has only paid \$8.6 million in the entire fifteen years it has been operating in Britain.

Starbucks is of course not alone and similar outrage has been leveled against Google, Amazon, and just about every other major company operating in the world today.¹⁰

Vodafone UK, a subsidiary of Verizon, also paid no taxes for a number of years.¹¹ This outrage sparked separate protests across London at Vodafone stores. These groups later merged and started UK Uncut, a tax avoidance awareness group that has since grown and established chapters in the US and Canada. A recent TVO documentary entitled "The Great Canadian Tax Dodge," follows the work of the more organized civil society group The Tax Justice Network, and estimates that Canada loses over \$80 billion a year due to tax avoidance both in corporate abuse of tax code loopholes and also through the use by wealthy individuals of offshore tax havens.

"It might be immoral but it's not illegal" is the usual response by politicians to the public outrage that these schemes engender; it was also President Obama's response to the outrage over the behavior of financiers that brought down the global economy in 2008. Coupled with tax avoidance is the equally troubling development of "corporate welfare," the term used to describe the phenomena that not only are some companies not paying taxes, but are actually being paid by the state to stay and do business in the country. Subsidy Tracker, an initiative funded by such diverse groups as the Ford Foundation and the Unitarian Church, documents these government giveaways. When corporate welfare and tax avoidance are both taken into account some of these companies actually receive far more from the state than what they contribute in taxes. Boeing

¹⁰ "Starbucks pays corporation tax in UK for first time in 5 years." The Guardian, June 23, 2013; accessed July 20, 2015 <http://www.theguardian.com/business/2013/jun/23/starbucks-pays-corporation-tax>.

¹¹ The Independent (2015). "Vodafone's £84bn tax avoidance bonanza: Nothing for taxpayers in Verizon deal while bankers share £500m in fees." The Independent, September 2, 2013; accessed July 20, 2015, <http://www.independent.co.uk/news/business/news/vodafones-84bn-tax-avoidance-bonanza-nothing-for-taxpayers-in-verizon-deal-while-bankers-share-500m-in-fees-8794169.html>.

tops the list at 137 subsidies, valued at a little over \$13 billion, but that is understandable as it does work for the US military. Far more suspicious are entertainment companies like Disney, foreign companies like Nestle and Samsung, and most troubling, financial firms like Goldman Sachs and JP Morgan Chase.¹²

2.2.7. The Success of Thomas Piketty's *Capital In The Twenty-First Century* (2014)

Few works have made an impact like Thomas Piketty's. Piketty's work is praised for three things. First, his data set estimating actual elite wealth represents one of the most novel attempts at calculating what are often very secret and unknowable figures. Second, his simple formula $r > g$ highlights a dynamic which shows that as returns on investments (r) remain larger than economic growth (g), wealth is siphoned to top earners at an exponential rate over an increasingly shorter period of time. The average rate of return on investment over the past few years has been around six percent while economic growth since the emergence of capitalism hovers at around two percent. Hence:

[French L'Oreal heiress] Liliane Bettencourt, who never worked a day in her life, saw her fortune grow exactly as fast as that of Bill Gates, the high-tech pioneer, whose wealth has incidentally continued to grow just as rapidly since he stopped working. Once a fortune is established, the capital grows according to a dynamic of its own, and it can continue to grow at a rapid pace for decades simply because of its size... This is a basic but important mechanism, with dramatic consequences for the long-term dynamics of accumulation and distribution of wealth. Money tends to reproduce itself (Piketty 2014, 440).

Piketty argues that we have entered into a phase of "patrimonial capitalism" where elites are the beneficiaries of vast fortunes they did not create themselves. This contradicts the assertion made, for example, by Chrystia Freeland in her book *Plutocrats* (2012), which maintains that the rich of today are workaholic meritocrats, not the landed gentry like in old

¹² "Subsidizing the Corporate One Percent: Subsidy Tracker 2.0 Reveals Big-Business Dominance of State and Local Development Incentives." goodjobsfirst.org, February, 2014; accessed February 20, 2015, <http://www.goodjobsfirst.org/sites/default/files/docs/pdf/subsidizingthecorporateonepercent.pdf>.

Europe. In her earlier work on Russia's post-communist privatizations *Sale of the Century* (2001), she notes that the now infamous Russian oligarchs may be stereotyped as crude macho business men with young trophy wives, but they also all have advanced degrees, mostly PhDs in math and physics. Freeland names the new global super rich the "alpha geeks," but to Piketty such a characterization is an older stereotype from the 1980's, when this was perhaps true. Now, thirty years later, we are dealing with the children of the "alpha geeks," and the democratic effects that such wealth concentration has on politics. Of the millennials that ran for Congress in the 2014 election, almost all were the children of American business and political dynasties.

Building on Piketty's work, Tim Donovan of Salon writes:

Examining the full slate of the millennials running for Congress this term, a troubling trend emerges. Despite varying slightly on a number of other (mostly social) issues, the majority of these candidates display an almost monomaniacal obsession with "entitlement reform" and balancing the budget, as if that were the only long-term crisis facing young Americans.¹³

Lastly, Piketty also shows that historically this "patrimonial capitalism" and extreme wealth concentration is the natural state of capitalism. The "not-so-golden-age" (Robert Reich) of the Keynesian welfare state — which saw economic growth coupled with New Deal redistributive measures like progressive taxation policies — was actually an historic aberration. The historical circumstances that forced state intervention into the workings of capitalist processes included the massive popular movements of the progressive era (1890s-1930s) and the threat of communism: the underlying logic seems to have been that unless a deal was made with the working classes ("The Treaty of Detroit"), elites risked being overthrown by the working classes (communism).

¹³ "Clueless rich kids on the rise: How millennial aristocrats will destroy our future." Salon, July 21, 2014; accessed February 22, 2015, http://www.salon.com/2014/07/21/clueless_rich_kids_on_the_rise_how_millennial_aristocrats_will_destroy_our_future/.

Piketty holds that the only way to save our political systems from the very real threat that such wealth concentration poses is state intervention on a globally organized level. He proposes a progressive global wealth tax of two percent coordinated across nation-states on investments and inheritance over a certain amount. Although rightly criticized as idealistic, it represents a first formulation of a solution to this enormous problem; and as he shows, since these elites have gone global, depositing their money and investments all over the world, the taxation regime must also be global.

2.2.8. The Popularity of Senator Elizabeth Warren

I hear all this, you know, 'Well, this is class warfare, this is whatever.' No. There is nobody in this country who got rich on his own — nobody. You built a factory out there? Good for you. But I want to be clear. You moved your goods to market on the roads the rest of us paid for. You hired workers the rest of us paid to educate. You were safe in your factory because of police-forces and fire-forces that the rest of us paid for. You didn't have to worry that marauding bands would come and seize everything at your factory — and hire someone to protect against this — because of the work the rest of us did. Now look, you built a factory and it turned into something terrific, or a great idea. God bless — keep a big hunk of it. But part of the underlying social contract is, you take a hunk of that and pay forward for the next kid who comes along (Elizabeth Warren in her speech popularly titled "you didn't build this alone" during her successful Senate campaign of 2012).

When President Obama used some of the points from the above cited speech in a speech of his own, the Republicans countered by making the official theme of their 2014 National Convention "We Built It." Commentators laughed at how the Republican's official theme was based on a misquote since neither Warren nor Obama said that business elites didn't build their own businesses: they didn't build it *alone*. The point was to emphasize that without "paying it forward" through taxes that help maintain the very physical and social infrastructure that they rely on to build their businesses, they are not fulfilling the social contract. It was also a way of bringing attention to, and counteracting, some of the self-congratulatory views of elites that they

are the job and wealth creators and should be praised and rewarded with tax breaks for their wealth creation.

Warren, a former bankruptcy expert at Harvard Law, made her debut in politics as the brains behind the Consumer Financial Protection Agency, a federal bureau that now oversees financial products like credit cards and mortgages, making sure the contracts adhere to existing laws and regulations, while protecting consumers against predatory lending practices. In talks she has given around the country during this period, she mentions how when credit cards first came on the scene in the late 1970s the average contract was a page long, but by the late 2000s the average length was thirty pages of what the industry terms "mice print." She also talks about what the credit card industry refers to as the "sweet spot;" the situation in which impoverished people, struggling to pay down their credit card debt, are only able to make minimum payments on the accruing interest without substantially denting the principal. Unfortunately she was not tasked to head the agency she created due to financial industry pressure and their lobbying efforts against even the establishment of the agency. Instead, she successfully ran for the Senate in 2012, and her videos grilling executives and regulators have become popular viral hits.

I discuss Warren's pre-politics academic contributions in the next chapter, but for the purposes of establishing the context of the thesis, it is important to note that "populist" politics and mass democracy are making headway as an alternative to the usual centrist, "extreme center," (Tariq Ali) or "the party of Wall-Street with two wings" (David Harvey) that has characterized post-Cold War Western — but now arguably global — politics. The extraordinary rise of Syriza (The Coalition of the Radical Left) in Greece and the rise in popularity of Podemos in Spain also signal this new opening for an alternative to a system that for over three decades has had none. These political parties have emerged as a result of the unrest of 2011 and as

activists developed their movements into political parties. This is one direction that the Occupy movement could have taken if it had not been so suspicious about politics.

2.2.9. Black Unrest and Organizing under "The New Jim Crow"

At the Davos summit of 2015 that I mentioned earlier, in which wealth inequality and social unrest were the big talking points, the Town of Ferguson and the latest instances of black protest were given as examples of political unrest, not Occupy or the years of youth rioting in Greece and Spain. Michelle Alexander's book *The New Jim Crow: Mass Incarceration in the Age of Colorblindness* (2010) has been the catalyst for a new civil rights movement that has gained in support and momentum. The book has actually been distributed alongside a study guide to black churches and civil rights chapters, building the historical and intellectual foundations for the new movements. Alexander represents a different generation of black activist scholars fighting for prison abolition. Earlier works include Angela Davis' large corpus on the issue, most notably *Abolition Democracy* (2005) and *Are Prisons Obsolete?* (2003); as well as former Black Panther Party Chairman Elaine Brown's *The Condemnation of Little B* (2003), which tells the story of Michael Lewis as an example of the epidemic of black youth who are being sentenced to prison as adults.

Unfortunately Brown and Davis carry a lot of stigma associated with their past work during the period of "militant" black activism of the 1960s and 70s. Alexander on the other hand represents a new breed of 'respectable' civil rights lawyers brought up in the 1990s. In her book she talks about coming to consciousness out of this "politics of respectability" that has been a feature of a certain black middle class which emerged in the 1990s Clinton "post-racial" era. She documents how both the black church and traditional black civil rights organizations like the

NAACP turned their backs on the most marginalized and impoverished segments of black society in order to gain access to the corridors of power.

The "politics of respectability" drove a wedge between the black community at a moment in history when the "war on drugs" was criminalizing the symptoms of poverty. This has led to the present crisis of mass incarceration in communities of color. Black organizations at this time were focusing on maintaining affirmative action programs in elite schools while highlighting public cases of "good" black people being targeted by police tactics. In this period (1980s-2000s) these historical and now respectable organizations ignored the overwhelming numbers of black men, women, and youth being sent to prison with unreasonably long sentences on minor drug offenses or minor assaults trumped up as attempted murder. Alexander states: "with all deliberate speed, civil rights organizations became 'professionalized' and increasingly disconnected from the communities they claimed to represent" (Alexander 2010, 225).

One defining moment of change came in 2008 when PEW Research released its report "1 in 100" which stated that in 2007 the US crossed a sobering threshold: that one out of every one hundred people in the US were in prison (more than 2.3 million people) while one out of every thirty-one were in prison, on parole, or on probation (more than 7.3 million): the highest of any country in the world; China is next with a population almost four times larger than the US but with only 1.2 million people behind bars. Furthermore, over fifty percent of the US prison population is black even though black people account for only thirteen percent of the population as a whole. With the spreading poverty that goes hand in hand with liberal economic reforms comes a criminalization of the symptoms of that poverty, such as drug use and vagrancy. Alexander reviews the statistics which show that in the nostalgic economic "success" of the

Clinton years, black communities were actually worse off than they were at the time of Martin Luther King Jr.:

African Americans, as a group, are no better off than they were in 1968 in many respects. In fact, to some extent, they are worse off. When the incarcerated population is counted in unemployment and poverty rates, the best of times for the rest of America have been among the worst of times for African Americans, particularly black men... [T]he notion that the 1990s — the Clinton years — were good times for African Americans, and that 'a rising tide lifts all boats,' is pure fiction. As unemployment rates sank to historically low levels in the late 1990s for the general population, jobless rates among noncollege black men in their twenties rose to their highest levels ever, propelled by skyrocketing incarceration rates (Alexander 2010, 228).

When coupled with the leaks of Julian Assange and Edward Snowden we find that economic liberalism is moving into a complex police state coupled with a national security surveillance apparatus that even exceeds the abilities of the East German Stasi, Russian KGB, and Nazi Gestapo. Furthermore, communities of color are beginning to express that they feel under siege; not just police killing black youths with impunity, but also the use of legalized racial profiling tools like stop-and-frisk. Jackie Robinson, mother of two and a member of The Morris Justice Project in the Bronx told *The Nation*: "As a mother, it bothers you... Of all the things I have to worry about when my kids walk out the door, I don't want to have to worry about them being harmed by the police. It makes you feel like you can't protect your children. Something has to be done."¹⁴ Like a military occupation in wartime these communities of color report being stopped daily with some young men of color being targeted over one hundred times a year: at least once a week!¹⁵

¹⁴ "Stopped-and-Frisked: 'For Being a F**king Mutt.'" *The Nation*, October 8, 2012; accessed February 20, 2015, <http://www.thenation.com/article/170413/stopped-and-frisked-being-fking-mutt-video>.

¹⁵ On the militarization of the police and their deployment in poor communities and communities of colour see The American Civil Liberties Union, "War Comes Home: The Excessive Militarization of American Policing" (2014).

Furthermore, as Angela Davis explains, this model of community policing of minority groups and the American model of incarceration are being exported the world over as the answer to deal with economically displaced groups, immigrants, and people who just are not making it under the new economic order in the post-Cold War era.

What I have argued in this chapter is that the Church has begun to position itself on "the right side of history." As wealth inequality and the recalcitrance of elites becomes more and more a political concern for the general public, the Church as a global institution within the structures of the international civil society is becoming once again a moral voice against injustice. In what capacity can the Church become this moral voice and how does its position within the international civil society aid this effort are questions that I will address in the subsequent chapters. In order to fulfill this role it has to continue to clean up its own house and evaluate its past responses to political and economic trends. It is not clear what real power the Church has in the secular differentiated sectors of liberal modernity, or if these differentiated sectors are porous enough to allow the moral voice of religious institutions an effective say in the political questions of economic policy and international development.

Part II: The Politics of Economic Globalization and the Academy: World-Systems Analysis, Marxism, and Liberalism

3. The World-System of Historical Capitalism: Globalization in the Post-Cold War Era

What does globalization mean in the context of historical capitalism? And how are policies of economic liberalism enacted on a world scale obfuscated by discourses of "development" and "globalization?" In order to situate the ideological changes in the last quarter century of Catholic social thought, I first turn to the framework of world-systems analysis initially pioneered by Immanuel Wallerstein in his 1974 work, *The Modern World System*. World-systems analysis provides one of the most comprehensive frameworks in detailing the history of globalization and economic liberalism, as well as the relationship between capitalism and the state. This chapter is devoted to defining the concept of globalization through the lens of world-systems analysis. In this attempt I first review the evolution of the field as a trans-disciplinary movement by scholars, most of whom began their careers working on postcolonial global south economic issues, notably Wallerstein and Samir Amin.

Second, I outline the account given by world-systems theorists of the history and development of "historical capitalism" (Wallerstein), or "really existing capitalism" (Amin), in parallel emergence with the interstate system after the Treaty of Westphalia (1648). In the words of these scholars, capitalism is birthed alongside the very first modern state structures realized in the Dutch United Provinces and then moves through two other "hegemonic cycles" (the British and the American). According to this telling of history, and probably the most important feature of world-systems analysis, is that there is fundamentally nothing new about what today we call globalization; the specific policies we see being enacted have been a feature of each successive "hegemon" (Dutch, British, US) from the very moment of the symbiotic birth of capitalism and the modern interstate system.

Third, I look at resistance in the framework of world-systems theory: what they refer to as antisystemic movements. Briefly, resistance has always been a feature of the world-system of historical capitalism, even in the peasant revolts of the preceding feudal era. But as capitalism becomes more world-encompassing, building the networks and communications needed in its operations, the revolts and uprisings also gain a solidity and become movements. The last instance of chaotic unorganized uprising was in Europe in 1848, a continental-wide revolt that was brutally suppressed. It is not until the 1870's that antisystemic movements begin to crystallize and eventually seize state power in the form of socialist and communist governments. I deal with the question, where is the "family of antisystemic movements" now in the aftermath of the fall of communism and the failure to maintain state power. Through answering this question I highlight the difference between the "old left movements" (labor) and the "new left movements" (identities or what world-systems analysts call "status groups") in the shifting relationships to the systems of production. Indeed, another key observation of world-systems theory is that as capitalism advances, rearranging the lives of all peoples on the planet, different struggles emerge from the different groups that are constructed as a result of these new relationships; these are the status groups that engage in new forms of struggle: women's liberation, anti-racism groups, LGBT organizations, immigrant rights activists, indigenous groups, and the environmental movement.

Lastly I examine the present context through the framework of world-systems theory, analysing the crisis inherent within a declining US hegemonic situation. These issues include (1) political instability or "systemic chaos" (Giovanni Arrighi 1999) resulting from enormous inequality; (2) financialization and austerity politics which deepen the systemic chaos as well as discredit the popular legitimacy needed to maintain hegemonic status; and (3) expulsions and

"denationalized state agendas" (Saskia Sassen 2003). This last point on the decline of the state brings together the world-systems scholarship with the work of Saskia Sassen and deals with the issue of the expulsion of state sovereignty in this latest phase of capitalist transformation.

Although the world-systems theorists are careful not to regurgitate older Marxist predictions of "the last crisis of capitalism," there is something fundamentally different with the decline of the US hegemon from earlier hegemonic transitions; namely, the breakdown of the historic, though often clandestine, partnership of state power with capitalist power. It remains to be seen whether this is merely the transition to an East Asian capitalist hegemon, or a larger transition like the shift from feudalism to capitalism. For the purposes of this work it is important to highlight the relationship of globalization and historical capitalism in order to understand the transformations in modern Catholic social thought. In the next chapter I deal with the conflict between Marxism and Liberalism, a conflict waged on many fronts but which has had a particularly formative role on the social teaching, as well as a divisive impact on the Catholic Church as a whole .

3.1. The Emergence of World-Systems Analysis: Its Unit of Analysis and Influences

The world-economy of historical capitalism is the primary unit of analysis of world-systems theory. By ignoring the usual academic requirements of a narrow and specific focus, world-systems analysis is attempting the political task of bringing to light the distorting compartmentalization of academic fields:

The problem is that we have studied these phenomena in separate boxes to which we have given special names — politics, economics, the social structure, culture — without seeing that these boxes are constructs more of our imagination than reality... We have been arguing that the separate boxes of analysis — what in universities are called the disciplines — are an obstacle, not an aid, to understanding the world. We have been arguing that the social reality within which we live and which determines what our options are has not been the

multiple national states of which we are citizens but something larger, which we call a world-system (Wallerstein 2004a, x).

This conviction against the Enlightenment compartmentalization of the academy — that the market is studied by economists, the state by political scientists, and civil society by sociologists — is a critique of the dominant liberal ideology that characterizes modernity. Indeed, as Wallerstein states, liberal ideology insisted that modernity be defined by the differentiated spheres of the market, the state, and the civil society. The emergence of the US hegemon after 1945, and with it the expansion of the university system around the world, dealt the first major blow to these compartmentalizations. Four debates during this period helped set the stage for the emergence of world-systems analysis.¹

First was the "core-periphery" distinction advanced by "dependency theory" which was first developed by the United Nations Economic Commission for Latin America (ECLA) in 1948. The core-periphery distinction was brought forth by third world scholars who insisted that international trade was not a trade between equals, but that the third world represented a space of uneven development that was essential to the success of the core metropolises. The phrase "development of underdevelopment" (Andre Gunder Frank 1970) highlights this disparity and was part of the idea used to criticize the policies that were enacted by core states and large corporations. Underdevelopment was no longer seen as an original state but as part of the process of historical capitalism. Core, periphery, and semi-periphery are major categories that are taken up by world-systems theorists.

Second was the discussion in Eastern Europe of the Marxist concept of the "Asiatic mode of production," a discussion which was silenced by Stalin, but which after his death reemerged

¹ These four debates are outlined in the first chapter of Wallerstein's *World-Systems Analysis: An Introduction* (2004a). See also Wallerstein 2004b, 219-225.

and began challenging orthodox Marxism. The Asiatic mode of production was Marx's description of the high empires that were being studied by Orientalists at the time. This mode of production was embodied in highly bureaucratic, large scale, and autocratic empires (particularly China and India). The debate began to open a challenge to the idea of a teleological progression from feudalism to capitalism and then to socialism. The discussion was repressed by Stalin, as the description of the Asiatic mode of production too closely resembled the mode of production being developed in the Soviet Union.

A similar opening of discussion was happening in the Western academy with the scholarship emerging on the transition from feudalism to capitalism. This is the third debate that laid the ground for the development of world-systems analysis; and like the Marxist debate on the Asiatic mode of production, it too challenged the developmental assumptions in vogue at the time. In this case it challenged the development claims of the capitalist West; namely, the stage model that characterized American "area studies" in the post-World War II period.

The *dependistas* (dependency theorists), inspired by the Cuban Revolution, were engaged in a critique against both the ideology of the capitalist stages of development and the communist parties of Latin America. They argued that by advancing the feudalism-capitalism-socialism stage model, the communists were merely reproducing a variant of the capitalist model. The *dependistas* argued for a socialist revolution now, without the need for a phase of capitalist development, even if it promised a teleological vision of a socialism to come.

The fourth and most profound influential debate of the period for world-systems theory was the emergence of the French *Annales* school, which was first formed in the interwar period by Lucien Fabvre and Marc Bloch to challenge the predominance of political history in French

historiography. They argued that "long-term generalizations about historical phenomena were in fact both possible and desirable" (Wallerstein 2004a, 15).

Suddenly, after 1945 it blossomed, and under the direction of the second-generation leader Fernand Braudel, it came to dominate the historiographical scene in France and then in many other parts of the world... The Braudelian era represented both an intellectual and an institutional attack on the traditional isolation of the social science disciplines from each other... In his first major work, he insisted that the sixteenth-century Mediterranean, which he was studying, constituted a "world-economy" (*économie-monde*), and he made the history of this world-economy the object of his study (Wallerstein 2004a, 15).

The influence of Fernand Braudel is of paramount importance to the understanding of the development of world-systems theory; his contribution is honored through the name of the primary academic institute for world-systems theory: The Fernand Braudel Center for the Study of Economies, Historical Systems, and Civilizations at Binghamton University. Braudel's distinction between the market and capitalism is probably the most important contribution that Braudel made to the development of a history of capitalism. According to Samir Amin:

The confusion created in the dominant discourse between the concept of free market economy and that of capitalism is the root cause of a dangerous relaxation of the criticism leveled against the policies implemented. The market, which naturally refers to competition, is not capitalism... Market and capitalism are two distinct concepts; the really existing capitalism being the very opposite of what the imaginary market constitutes (Amin 2004a, 5).

Capitalism is essentially "anti-market"; that is, capitalism emerges alongside the modern state and the rights of property to maintain the monopoly that certain capitalists gained in different fields of production and trade. The market and capitalism are not synonyms and the state is not anti-market; rather, the state is fundamentally necessary for the propertied classes to maintain their hold on capital accumulation through state backed monopoly privileging, and both capitalism and the state are historically birthed in this symbiotic relationship. Capitalism, in

prizing the endless accumulation for the capitalist classes with the use of state power, destroys competition in favor of monopolization. The ideology of free market competition is fundamentally contradictory to the history of really existing capitalism, which moved alongside the development of state power to enforce monopoly protections.

Braudel outlines a three-tiered hierarchical structure of the world-economy. At the bottom is what he calls *material life*, the most elementary form of production. Subsistence farming could be classified in this field, as could the many areas of "women's reproductive work," which were outlined in Marilyn Waring's famous work, *If Women Counted* (1988). Historically, it has been difficult to account for these activities, and the products that they produce have been hard to calculate using standard measurements such as GDP. One main debate since the concept of development first came on the scene was whether this is a deliberate strategy designed to systemically devalue this work, or whether the use of models that focus on GDP growth is a tool to appropriate value from this tertiary level, one example being the theft of traditional lands under the guise of "development." To Braudel, however, this lowest layer is for the most part entirely self-sufficient, and the market and capitalism need it to sustain themselves; as with all hierarchical systems, the activities of the lower strata are essential to the continued existence of the top.

The second level is the market itself, a system of horizontal networks of trade and communication that have existed for most of human history, hundreds of years before capitalism and the state came on the scene. Giovanni Arrighi states the history as such:

A world market economy, in the sense of many horizontal communications between different markets, emerged from the depth of the underlying layer of material life long before capitalism-as-world-system rose above the layer of the market economy... A loose but none the less clearly recognizable system of

horizontal communications between the principal markets of Eurasia and Africa was already in place in the thirteenth century. And for all we know... this system of horizontal communication actually emerged several millennia earlier (Arrighi 1994, 10).

The third tier is the anti-market and the home of capitalism, which, as Braudel shows, is not necessarily modern — "everywhere, from Egypt to Japan, we shall find genuine capitalists" (Braudel 1984, 486). But the modern state is fundamentally birthed for capitalist interests and is a product (perhaps the primary feature) of modernity:

Capitalism only triumphs when it becomes the state, when it is the state. In its first great phase, that of the Italian city-states of Venice, Genoa, and Florence, power lay in the hands of the moneyed elite. In seventeenth-century Holland the aristocracy of the Regents governed for the benefit of and even according to the directives of the businessmen, merchants, and money-lenders. Likewise, in England the Glorious Revolution of 1688 marked the accession of business similar to that in Holland (Braudel 1977, 64-65).

To Arrighi the task is not to elucidate the transition from feudalism to capitalism, but from scattered to concentrated capitalism:

the question that bears directly on our research is not when and how a world market economy rose above the primordial structures of everyday life; it is when and how capitalism rose above the structures of the pre-existing world market economy and, over time, acquired its power to reshape the markets and lives of the entire world (Arrighi 1994, 10-11).

Only in Europe did this form of capitalism emerge to propel states to engage in territorial conquest on a global scale and subject the entire world to a truly global capitalist system. It is also important to stress another essential point: that the world-system of world-systems analysis is not necessarily the economically globalized world, though that is the context in which we find ourselves and indeed it is the form into which the world-system of historical capitalism has

evolved. Rather, the hyphen in world-systems analysis is there to stress that the unit of analysis, the system of historical capitalism, is a world in itself:

putting the hyphen was intended to underline that we are talking not about systems, economies, empires *of the* (whole) world, but about systems, economies, empires *that are* a world (but quite possibly, and indeed usually, not encompassing the entire globe)... It says that in 'world-systems' we are dealing with a spatial/temporal zone which cuts across many political and cultural units, one that represents an integrated zone of activity and institutions which obey certain rules (Wallerstein 2004a, 17).

Before I tackle the history of capitalist hegemonic transitions in the next part of this chapter, I need to discuss Braudel's concept of the *longue durée*, which was developed in his criticism of what he titled "episodic history" (*histoire événementielle*). The *longue durée* emphasizes the importance of structural time, or long-lasting (but not eternal/essential) basic structures that underlay historical systems; this analysis is brought together with the study of the medium-run trends that contain the expansions and contractions of hegemonic periods which are characterized by more cyclical processes. To world-systems scholars the modern world-system in the *longue durée* begins with the ascent to hegemony of the United Provinces a little before the Peace of Westphalia in 1648 (although its capitalist precursors are seen in the northern Italian city-states) and continues on through a series of economic expansions and financial contractions. The period of financial contraction signals a shift to a new rising hegemon who is able to strategically use the growing period of "systemic chaos" brought about by financialization to increase their influence in the world-system. Historically the Dutch were ousted by the British hegemon, shortly after the establishment of the Westphalian system, with the British being replaced by the American hegemon after the Second World War.

3.2. The World-System of Historical Capitalism: Three Hegemons and Their Cycles

The concept of hegemony (attributed to Antonio Gramsci) is meant to distinguish leadership without overt dominance. That is, intellectual and moral leadership, in this case of one state over others in the interstate system set up with the Treaty of Westphalia. During later phases of hegemonic expansions in the world-system timeframe, particularly the British in the case of India in the mid nineteenth century, we see a rise of older forms of imperialism. In that case we have what Ranajit Guha referred to as "dominance without hegemony," but within the frame of competing core states, we would still refer to hegemony, in that the imperial model becomes one that other core states attempt to imitate in their relationship with the periphery: "the concept of 'world-hegemony' adopted here... refers specifically to the power of a state to exercise functions of leadership and governance over a system of sovereign states" (Arrighi 2004, 27). Although in certain periods the hegemon enacts imperialist policies towards the periphery, world-systems scholars hold that all historic attempts to create empire or a world-state (Napoleon with France or Hitler with Germany) are thwarted by capitalist interests who prefer the interstate system of competing core states because this system minimizes sovereign control over the capitalist drive for accumulation. They are imperialist only in their relation to the periphery and semi-periphery. World-states can be very regulatory; furthermore, multiple competing states, especially those pitted in the asymmetric competition of core, periphery, and semi-periphery, can be regions for further capital investment and expansion: opening up new markets to monopolize in the systemic process of the endless accumulation of capital:

If such thrusts [toward empire] never succeeded in historical capitalism, it was because the structural base of the economic system and the clearly-perceived interests of the major accumulators of capital were fundamentally opposed to a transformation of the world-economy into a world-empire... For if their state-machinery became too strong, it might, for reasons of internal political equilibrium, feel free to respond to internal egalitarian pressures. Against this threat accumulators of capital needed the threat of circumventing their own state-

machinery by making alliances with other state-machineries. This threat was only possible as long as no one state dominated the whole (Wallerstein 2011, 57-58).

Each hegemon reaches crisis points at various phases due mostly to what Marx referred to as the crisis of over accumulation. Competition increases as capitalist firms and businesses lose market share in various sectors resulting in decreasing rates of profit. Even with state-backed regulations that ensure certain monopolies, new capitalists (or capitalists from other sectors) pose a threat to niche markets. Similarly, increased financialization occurs when this excess capital cannot find profitable investment in continued market expansion and instead focuses on investing in the money markets themselves and various forms of lending.² The systemic chaos that results during these periods are the symptoms of the crisis of over accumulation and are identified by world-systems theorists as periods of hegemonic decline. The crisis becomes unmanageable by the hegemonic state, and the fluidity of finance capital furthers this decline through its transnational flows — putting its money into other states further undermines the ability of the hegemon to solve its crises. At this point a new hegemon arises, one that can solve the crisis of over accumulation (although always only temporarily), while also signalling a structural transformation of the workings of the world-system. In the three transition periods we see Dutch financiers investing in the British state and its enterprises, British financiers investing in the US, and now we see US firms investing in the East Asian market, which world-systems analysts see as the new possible rising hegemon (Arrighi 1994, 2007; Arrighi and Silver 1999; Wallerstein 2004, 2011).

² Recall from the last chapter that the current value of financial derivatives stands at over a quadrillion dollars, at the same time many are wondering when manufacturing jobs are going to come back. The strength of world-systems analysis is in showing that the problems we are facing today are recurrent cycles which have been a feature of the world-system since the seventeenth century.

World-systems analysts emphasize that each hegemon usually reigns for a period of less than a hundred years, followed by another hundred years of systemic chaos culminating into a "thirty years' war", in which the new hegemon emerges reshaping the world-system of historical capitalism through changes to the interstate structure (Wallerstein 2004a, 58-59). These "thirty years' wars" were the actual Thirty Years' War (1618-1648), the Napoleonic Wars (1792-1815), and the long Eurasian wars (World Wars with the interwar period) (1914-1945) (Arrighi and Silver 1999a, 23). These transformative wars are wars between those that are allied around a world-empire on the one hand, and those allied around an emerging hegemon on the other: the Dutch against the Spanish Empire allied with the Hapsburg dynasty and the Pope, the British against the French, and the Americans/Allied forces against Germany, Italy, and Japan.

To outline the contradiction with endless capital accumulation I turn briefly to the example of the Venetian city-state, which to world-systems theorists represents a precursor to the capitalist states that emerge two hundred years later in the form of the Dutch hegemon: loosely the period between the Treaty of Lodi (1454) and the Treaty of Westphalia (1648).³ Chrystia Freeland ends *Plutocrats* with a warning about the dangers of plutocracy and oligarchy by using the example of Venice. Basically, an enabled (and now ennobled) rich class — that emerges in periods of opportunity, trade, and expanding business — kick the ladder out from under themselves, securing an elite future for their own children at the expense of a politically and economically open society:

This political shift from a nascent representative democracy to an oligarchy marked such a striking change that the Venetians gave it a name: La Serrata, or the closure. And it wasn't long before the political Serrata became an economic one, too. Under control of the oligarchs, the Venetian state gradually cut off the

³ The Peace of Lodi was a treaty between the northern Italian city-states whose commercial competition broke into all out war, mostly with the use of hired mercenary armies.

commercial opportunities for new entrants... [The] reigning elite were acting in their own immediate self-interest... But in the longer term, La Serrata was the beginning of the end for the city's oligarchs, as well as for Venetian prosperity more generally (Freeland 2012, 279).

Although Freeland is a Harvard graduate trained by leading historian of the Soviet Union Richard Pipes, her book is more of a popular warning against the destructive power of elites, and she reminds her readers of the need to counterbalance this power with strong democracy and redistributive and regulatory state structures. To world-systems scholars, however, these trends — emergent capitalist class, financialization, decline — are a basic recurring aspect of the hegemonic cycles of historical capitalism; and the modern state from its very origins was birthed to favor capitalist interests. They place high importance on what are known as Kondratiev cycles or waves (from the Soviet economist Nicolai Kondratiev). These are economic super-cycles spanning fifty to sixty years and are characterized by rising economic growth and trade (the A-phase), followed by a slow-down and decline (B-phase). These cycles correspond to the Marxist notion of the crisis of over accumulation:

While the interests of all capitalists, taken as a class, seemed to be to reduce the costs of production, these reductions in fact frequently favored particular capitalists against others, and some therefore preferred to increase their share of a smaller global margin rather than accept a smaller share of a larger global margin... [A]t the same time, efforts to reduce the costs of production often reduced the flow and distribution of money, and thus inhibited the steady expansion of purchasers, needed to complete the process of accumulation (Wallerstein 2011, 17).

There is no agreement over what happens to these capitalists after each cycle. Arrighi holds that each new phase involves a "change of guard at the commanding heights of the capitalist world-economy" (Arrighi 1994, 87); while Wallerstein states that the capitalist classes are much more resilient. The ideology of the French revolution, "*la carrière ouverte aux talents*", as a self-justifying explanation of the rise of the bourgeoisie class, hides the liberal

progressive teleology of a legitimate hierarchy replacing an illegitimate one (Wallerstein 2004a, 62). In both the Marxist and liberal progressive reading of history, the French (and American) revolutions are seen as the overthrow of a decadent class of aristocracy in favor of a meritocratic class. To Wallerstein this is a liberal ideological reading of history:

We have already argued that the image of historical capitalism having arisen via the overthrow of a backward aristocracy by a progressive bourgeoisie is wrong. Instead, the correct basic image is that historical capitalism was brought into existence by a landed aristocracy which transformed itself into a bourgeoisie because the old system was disintegrating. Rather than let the disintegration continue to uncertain ends, they engaged in a radical structural surgery themselves in order to maintain *and significantly expand* their ability to exploit the direct producers (Wallerstein 2011, 105-106).

What is good for capitalists as individuals is not good for capitalists as a class, let alone society as a whole. Furthermore, this capitalist class, under the rule of economic self-interest, holds no allegiance to their respective states, or even the hegemon. When the hegemon is thrown into its irresolvable crisis, they invest in the next rising hegemon. Each successive hegemon offers new opportunities into expanding new markets. The birth of the trans-Atlantic slave trade was a feature of the Dutch hegemonic period and growth strategy and was perfected by the British colonists of America, while at the same time the Dutch secured access to the trade routes to what Braudel referred to as "the super-world-economy": Islam, India, and China. Under the British system full free-market imperialism took hold with both a large scale establishment of colonies — which as the hegemonic model was copied by virtually all European states — and a system in which the colonies paid for their own domination. Furthermore, while the Dutch hegemon reopened and secured the trade routes to the super-world-economy, wresting them from the Spanish and the older northern Italian city-states, the British militarily took over these areas and subjected them to their own imperial rule: dominance without hegemony (Arrighi,

Ahmed, and Shih 1999). The US hegemon, lastly, operates by a free-enterprise system relying heavily on the structures of transnational corporations, while the power of the state secures their entry into foreign markets. This is nothing new in the world-system and was characteristic of the early Genoese merchant Diaspora of Europe and their "trade fairs":

Local lords could have withdrawn the right to hold a fair located in their domain at any time. But they had no interest in doing so because the fairs were a source of revenue and financial services (money-changing in particular) which other lords would have been only too glad to welcome to their own domains. So the fairs prospered, and although they were no substitute for the institutions of feudal rule, they eventually sapped their vitality... Similarly, today's transnational corporations are no substitute for the governmental institutions of the modern system of rule... And yet, they may be contributing to their demise through the novel behaviors they generate... (Arrighi 1994, 81).

At issue here is the notion of sovereignty, which although claimed is nonetheless weakened with each passing hegemonic cycle. Each phase expands the Westphalian interstate system, bringing in more states at each turn, yet fundamentally diminishes the autonomy of the newly recognized states. The Dutch secured their independence from the Spanish empire and helped to institute the interstate system in Europe, while under the British hegemon newly democratic states (even the newly independent US) were recognized and brought into the system, and finally after World War II the US backed the new UN and Breton Woods institutions which brought in all the decolonizing states of the global south:

When it was first established under Dutch hegemony, national sovereignty rested on a mutual recognition by European states of each other's juridical autonomy and territorial integrity (*legal* sovereignty), and on a balance of power among the states that guaranteed their *factual* sovereignty against the attempts of any state to become so powerful as to dominate all the other. Violations of legal sovereignty have been countless, and the more so in periods of hegemonic breakdown. But after each hegemonic breakdown, the principle of legal sovereignty was reaffirmed on an expanding scale... Each reaffirmation and expansion of legal sovereignty was nonetheless accompanied by a curtailment of the factual sovereignty that

rested on the balance of power... Under U.S. hegemony, the idea [of factual sovereignty based on a balance of power] was discarded even as fiction (Arrighi, Hui, Ray, and Ehrlich Reifer 1999, 92-93).

The various hegemonic world powers which hold the reins of the interstate system in each successive period keep other states open to capitalist interests, challenging any notion of factual sovereignty that could emerge to challenge the capitalist model of the period. Furthermore, to world-systems analysts it is clear from the very beginnings of the modern state, that the state was birthed to serve capitalist interests through not only granting legal monopoly rights to various companies — Dutch joint-stock chartered companies, English manufacturers, and US transnational corporations (Arrighi, Barr, and Hisaeda 1999, 97) — but also to enact and enforce laws that subjugated slaves, workers, and peasants. It is clear from any review of the laws that states enacted from the very beginning of the interstate system that the state-machinery was instituted for the advancement of capitalist interests (Arrighi, Barr, and Hisaeda 1999; Arrighi, Hopkins, and Wallerstein 1989; Sassen 2006; Silver and Slater 1999). Sassen notes that in Britain repressive labor laws were passed mostly through parliament in a context of an exclusive voting franchise, while in the US it was through laws enacted by the courts serving mostly moneyed interests (2006, ch.3).⁴ That we at present think of the state as anything but serving the interests of endless capital accumulation shows the past success of the antisystemic

⁴ These laws were astonishingly barbaric and one-sided. The state both constructed a privileged legal persona in the bourgeoisie with its focus on the right to property and the state also engaged in a process of constructing the legal persona of a disadvantaged subject in the worker: "Parliament frequently aligned with the interests of the bourgeoisie and played a crucial role in this process. For instance, a 1769 law classified the voluntary destruction of machines and the buildings which contained them a felony, and instituted the death penalty for those found guilty of such destruction and a 1799 law prohibited the formation of worker's associations that wanted wage increases, a shorter workday, or any other improvements in working conditions" (Sassen 2004, 104). Furthermore the state was involved in the enforcement of labor contracts, yet rarely if ever enforced the employer's obligations: "[i]f British workers left their employer before they completed their contracts, they faced a variety of nonpecuniary punishments including prison terms with hard labor and whipping. For example, in 1860, 11,938 British workers were prosecuted for breach of contract, many of whom were coal miners and iron workers" (Sassen 2004, 113).

movements which arose in the late nineteenth century.⁵ It is to these movements that I now turn, in order to highlight both what modern conceptions of democracy owe to their struggle for equality and representation, as well as how their influence helped — although in a temporary and perhaps minimal way — the transformation of the state into a structure containing the possibility of social redress and economic redistribution.

3.3. The Evolution of the World Family of Antisystemic Movements: The Dilemma of Seizing State Power and the Relations of Status Groups.

Before I tackle the history of antisystemic movements and their contributions to the transformation of the idea of the state as a supposed agent of redress and redistribution, it is important to distinguish world-systems analysis from classical Marxism. One of the major differences between the two is that in classical Marxism the class war between the bourgeoisie and the proletariat rests on the assumption of an immutable class identity forged in the teleological struggle of history. To world-systems theory, however, the proletariat as a group never really functions in this historical way. First, they notice that *proletarianization* — a wide-scale process of transforming all peoples into wage-earners as the result of endless capital accumulation — is something that capitalists themselves fight against. As David Harvey writes, one of the main costs of production that capitalists seek to externalize is the cost of social reproduction.⁶ This is historically the work of women who care for children and the extended family, and who in areas still undergoing capitalist transformations still engage in small scale

⁵ In the last chapter I mentioned Robert Reich's (2007) work on US regulatory policy which showed that since the 1980's corporate and financial regulations are being used for inter-industry rivalries under the guise of consumer protection. Again, this is shocking only with the assumption that these laws are supposed to serve the public good, which historically has only been the case since around the time of the New Deal in the 1930s.

⁶ Robert Bellah also notes that as soon as the concept of industrial wage labor came on the scene it was rightly criticized as merely a mask for a new kind of slavery, one in which the owner no longer pays for the actual costs of taking care of his "property" (workers/slaves), but instead provides the lowest level of remuneration possible while shifting the burden of living onto the worker and family unit itself: "[Orestes] Brownson, writing before Karl Marx had penned a single of his famous lines, argued that wage labor is essentially a form of slavery. 'Wages,' he said in the 1840 article, 'is a cunning device of the devil, for the benefit of tender consciences, who would retain all the benefits of the slave system, without the expense, trouble, and odium of being slave-holders'" (Bellah 1975, 119).

subsistence farming. For example, the first progressive labor laws and mass mobilizations of workers in European and Anglo-American history revolved around the conditions of women and children in factories and mines during the mid to late nineteenth century (Sassen 2006; Arrighi, Hopkins and Wallerstein 1989). Hence, full scale proletarianization leads ever quicker to labor unrest as the entire *household* becomes reliant on wage-labor to survive.

Second, world-systems scholars show that it is more accurate to view the history of proletarianization in terms of households than to view the proletariat as a class: "Many wage-earners were not full-lifetime proletarians but members of non-proletarian households who sold their labor power on a more or less temporary basis" (Arrighi, Hopkins, and Wallerstein 1989, 79). Households derive their survival from many different activities, not just wage work or subsistence farming, but also selling small goods in small markets and occasionally sending other members to work in wage-labor settings. These are by no means essentialist explanations of family structures, but show a general process of how households around the world have adapted to the transformations that capitalism has affected. As the process of historical capitalism unfolds, encompassing more territory and peoples, proletarianization gains momentum. The state contributes to this proletarianization through its tax regime, forcing all households to engage in some form of wage labor.

The fact that although the capitalists themselves seek to externalize the cost of social reproduction, growing forces of "primitive accumulation" (Marx) or "accumulation by dispossession" (David Harvey) expands the necessity of wage-labor to all members of the household, thereby negating the possibility of alternative subsistence options. Harvey states:

This dispossession of the mass of the population from direct access to the means of production (land in particular) releases labour power as a commodity into the

market place. Marx's so called 'primitive accumulation' may be overdramatized and oversimplified, but its essential truth is undeniable. Somehow or other the mass of a population has been put in a position of having to work for capital in order to live... All around the world the integration of rural and hitherto independent peasant populations into the workforces has occurred. Most dramatic of all has been the mobilization of women, who now form the backbone of the global workforce (Harvey 2010, 58-59).

Elizabeth Warren's academic work in the early 2000's focuses on how this process has occurred in American middle class households beginning in the 1980s when capitalism entered what has been called its neoliberal phase. The stagnation and decline in wages which was characteristic of this period has meant that a second parent has had to enter the work force permanently — as opposed to the previous middle class option of having a wage laborer in reserve — while access to credit becomes the safety net that families begin to rely upon in tough times. Whereas before the second parent would only occasionally enter the work force in times of financial difficulty, now with the emerging necessity of dual income households, credit become the means to carry families through. The result has been an increase in bankruptcy affecting families — which Warren's studies show to be the number one ground for divorce (Sullivan, Warren, and Westbrook 2001; Warren and Warren Tyagi 2004).

The *feminization* of the work force — both in the global north but more harshly in the global south — has occurred along the lines of what Saskia Sassen (2010) has called "contemporary versions of primitive accumulation." Briefly, she argues that the phase of finance capital we are witnessing at present is swallowing up industrial capitalist systems that were established in older periods of primitive accumulation. That is, the primitive accumulation described by Marx was characteristic of an older transformation of societies on a basis of industrial production and industrial agriculture. With the example of "land grabbing," mostly by financial firms and other governments in the global south but also in eastern Europe, we see

another transformation far more brutal than the first: whole scale expulsions of populations into urban slums, and not just the *feminization* of the work force, but also the feminization of survival (Sassen 2000). Older industrial capitalist transformations needed the newly proletarianized to work in order that the "surplus value" (Marx) could be extracted from labor as commodity. Sassen states that with this new form of capitalism the land itself is more valuable than any people or productive activities on it (Sassen 2010 and 2014). I will return to these themes in the next part, but for now it is important to note the dynamics of primitive accumulation and the resulting proletarianization.

A second distinction between classical Marxism and world-systems analysis is the way the proletarian revolution is formulated. As I noted before with the work of Wallerstein (2011), if the bourgeoisie revolutions were not really revolutions but merely the transformation of the aristocracy into the bourgeoisie, what does it mean to the formulation of a proletarian revolution, that in classical Marxism is based on the model of the French and American revolutions? To world-systems analysts these revolutions represent interclass rivalries that get historically coded as revolutions to secure and further the liberal ideology of historical progress. Furthermore, in all these situations massive peasant and urban unrest provides the destabilizing mechanism needed to break the power into which the newly reformed ruling class enters. This was also the case with the Protestant Reformation which unshackled papal power:⁷

One organizing logic at work in these struggles to strengthen royal power was a search for greater autonomy from the papacy... With its emphasis on the just price, prohibitions against lending at interest, and other strictures, the medieval moral

⁷ Martin Luther for instance helped solidify the independence of the German princes from the influence of Rome, but that does not make him the radical reformer or "speaker of truth to power" that he is remembered as: "Therefore let everyone who can, smite, slay and stab, secretly or openly, remembering that nothing can be more poisonous, hurtful or devilish than a rebel. It is just as when one must kill a mad dog..." Martin Luther (1525). "Against the Robbing and Murderous Hordes of Peasants."

order constrained the search for wealth and financial manipulation by the state, let alone by the merchant and banking bourgeoisie... The morality of the just price and prohibitions against lending at interest had already been seriously unsettled by the time Calvin [Dutch] argued that commercial success was a sign of divine election (Sassen 2006, 79).

In the case of the American Revolution, African American historian Gerald Horne argues in *The Counter-Revolution of 1776* (2014) that the British slave-owners in the colonies began to recognize that the growing trend towards abolition in the British social landscape meant that it was only a matter of time until slavery would be outlawed. According to the world-systems scholars' account, the end of the seven years' Anglo-French war (1754-1763) made unnecessary the British claims of military protection to the colonies, as the British victory over the French saw the end of French colonization in the Americas. Without the need for the British military to protect against French incursions, the colonists no longer saw the need for paying taxes to Britain; hence the main slogan of the revolution: "no taxation without representation" (Arrighi, Hui, Ray, and Ehrlich Reifer 1999, 56).⁸

The peasant and working class revolts that aided the destabilization of the system necessary for the bourgeoisie to take power were sporadic, local, and easily repressed by the new class power in control. It isn't until the "Spring of Nations" in 1848, which ultimately fell to counterrevolutionary forces in less than a year, that massive organizational strategies from below began to surface, and reemerge stronger and more organized thirty years later in the 1870s.⁹

⁸ Arrighi, Hui, Ray, and Ehrlich Reifer also note at this time the full collapse of Dutch finance, since the Dutch overextended itself by lending to all sides in the war and suffered a financial collapse in 1763. Although the British lost the War of American Independence it nonetheless emerges at this time as the hegemon. Furthermore, "The victory of the British at Plassey in 1757 initiated a massive transfer of wealth from India, initially as sheer plunder and after 1774 more and more as plunder disguised in commercial forms" (Arrighi, Hui, Ray, and Ehrlich Reifer 1999, 55). With these new funds the British bought back all its debt from the Dutch.

⁹ The International Workingmen's Association (IWA) represents the First International and first met in London in 1863 after a series of revolts in Poland convinced organizers of the need to join together communist, socialist, anarchist and labor union organizers internationally. Their first issue was to unite against the importation of foreign

These movements represent the first wave of antisystemic forces in the world-system and take the form of massive organized labor unrest. In the US this represents the birth of the "progressive era" which culminated in the New Deal of the 1930s; while in Europe it birthed both the Second and Third Internationals representing social democracy (the Second International) and communism (the Third International). This period also saw the birth of mass-party democracy with the extension of the voting franchise, also the result of mass mobilizations and revolts. These transformations to representative democracy resulted in new popular and active political parties which balanced the power of elite property owners who were originally the only people given the franchise since the birth of representative democracy within the interstate system during the late eighteenth century (Mair 2013). If today we think of the state as securing certain rights through universal suffrage and a popular mandate, it is because of the advances made in this period. One of the earliest goals of the socialist movements was seizing state power, and this was eventually achieved with the Russian Revolution of 1917 and in the election all over Europe of Social Democratic parties. But state power presented difficulties of its own as the state itself, locked in the interstate system birthed by capitalism, began to show an inability to reform to the revolutionary changes which were the demands of the original socialist revolutions themselves. The second form antisystemic movements took in this first wave were movements towards national liberation in peripheral countries. These anticolonial struggles too succeeded in their primary aim at seizing state power and instituting what we now call decolonization, but suffered the same problems the socialist and social democrats faced in achieving state power.

workers which were used as "scabs" to help break up strikes. The international collapsed in the late 1870's due to conflict between Bakunin (representing the anarchist wing) and Marx.

A major debate is whether or not really existing communism actually was an alternative to capitalism, or merely "bureaucratic state capitalism", a phrase first coined by Palestinian Trotskyist Tony Cliff in the 1940s (Lewis 2008, 154). As Stephen Resnick and Richard Wolff (1995) have argued, if capitalism is signified by classical Marxism to mean the expropriation by another class of the surplus value created by workers in the production process, the communist countries merely replaced the capitalist class with a state bureaucratic class. This class expropriated the surplus value of the working classes and set it to use under their own designs, albeit in a more planned and equal fashion than capitalists historically have done. To world-systems analysts, this major drawback to the realization of socialism represents a feature of the impossibility of working against historical capitalism within an interstate framework. Communist governments — and it is important in world-systems theory to remember that all these governments emerged in the *semi-periphery* and *periphery* — were forced to compete with the developed capitalist world in the system of interstate competition:

Antisystemic movements thus became collectively an increasingly consequential element in world politics. At the same time, however, they were distinctly less successful in moving towards their ultimate objectives. They did wrest many 'concessions' from the world's ruling strata, but they failed in lessening inequalities between classes and ethnonations. Worse still, they often turned their institutional underpinnings into new instruments of class and/or ethnonational oppression (Arrighi 2004, 80).

In terms of communist governments a history of trade embargo, forced industrialization, capitalist encirclement, and the later US-Soviet arms race all had a distorting effect. Taken alongside the failure of the revolution in Germany, these challenges led to the policy of "socialism in one country," which saw the abandoning of the internationalist drive essential to socialist transformation as it was originally conceived in Marxist teleology. The Western-

financed Russian civil war after the revolution of 1917 lead to a "hardened Leninism," and this set the stage for totalitarian Stalinism:

The doctrine of 'socialism in one country,' however, precisely suited the interests of Stalin and the majority of party officials, who now despaired of world revolution. When the Center finally succeeded in using the doctrine of 'socialism in one country' to assert its own control over the means of production, Stalin and the bureaucracy began to wield a class power on the basis of a new form of property — state property (Lewis 2008, 156).

Despite the failures of transforming the "dictatorship of the proletariat" (or "the vanguard of the Soviets" in its Russian manifestation) into socialism as originally conceived by Marx, these countries did nonetheless provide an alternative development model to Western capitalist paradigms. These radical challenges to the world-system represented the institutionalization of the first wave of antisystemic movements (labor and national liberation). The start of the organization of unrest emerges as a result of the *proletarianization* stemming from nineteenth century industrial capitalist primitive accumulation and colonial exploitation. It is in the analysis of the second wave of antisystemic movements that the world-systems theory shows how the continued transformation and new emergence of "status-groups" are linked to the changes in historical capitalism. Basically these "status-groups" refer to what sociologists call "identities", but the term status-group highlights the groups' relational importance to the subject-forming processes within the world-system; namely, forces of racism and sexism (which I will deal with more in chapter 4):

This term [status group] is the standard English translation of Max Weber's term *Ständ*. Weber's term is derived from the feudal system, in which one distinguished between different *Ständ* or 'orders' (aristocracy, clergy, commoners). Weber extended the term to mean social groupings in the modern world that were not class-based (ethnic groups, religious groups, and so on) and showed certain kinds of solidarity and identification. In the late twentieth century the term 'identities'

came into use, meaning more or less the same thing, but with perhaps more emphasis on its subjective character (Wallerstein 2004, 97).

Following their repeated strategy to draw historical linkages with earlier phases of historical capitalism, world-systems analysts see the world revolutions of 1968 as a repeat of 1848; that is, if 1848 signaled the birth of the first wave of antisystemic movements, 1968 represents another such "great rehearsal." This time it results in the emergence of new status-groups that a transforming historical capitalism produces through its forced changes in relations of production, new class formations, and its world-scale operations (Arrighi, Hopkins, and Wallerstein 1989). Black militancy, women's liberation, gay and lesbian rights, as well as the democratic struggles in the Soviet bloc are all features of this new family of antisystemic movements. Furthermore these are all struggles which represent groups which were unrepresented by the older labor and national liberation struggles:

the new 'family' of antisystemic movements that shook the world around 1968 was simultaneously a reaction against the recuperative power of prosystemic forces under U.S. hegemony and against the poor, even negative, performance of the world's old left movements — their 'weakness, corruption, connivance, neglect and arrogance.'... Although the movements were soon checked everywhere, the changes in power relations effected by the movements were not reversed (Arrighi 2004, 80-81).

These changes include a reduced capacity (1) of the West and Soviet bloc to police the third world as seen by the US failure in Vietnam and the Soviet failure in Afghanistan; (2) of dominant status-groups to subordinate minorities within core countries, which is an identifiable success of the women's movement, black civil rights movement, and the LGBT movements; (3) of the managerial strata to enforce labor discipline or to seek 'safe havens' of such discipline; and (4) of states to control their civil societies, the weakness of such control leading to the eventual breakdown of the Soviet Union itself. This new power of the civil society has also emerged to

affect Western government actions and policies (Arrighi 2008, 81; Arrighi, Hopkins, and Wallerstein 1989, 103-106). Although at the time that Giovanni Arrighi, Terrance Hopkins, and Immanuel Wallerstein wrote *Antisystemic Movements* in 1989 these victories seemed secured, they have since been successively whittled down by the counter reactionary forces that emerged right after the 1968 period, but gained strength under the so-called neoliberal revolution of the 1980s and in the triumphalist post-Cold War period of the 1990s.

In the larger picture of hegemonic transitions, Beverly Silver and Eric Slater note that a "virtuous and vicious" cycle characterizes hegemonic rise and hegemonic decline/transition. In the virtuous phase the rising hegemon brings to the new order, through cooptation, some of the disgruntled groups which helped delegitimize the past hegemon: the settler bourgeoisie in the Americas in the Dutch to British transition, and the Westernized postcolonial elite and the working class of the core states in the British to US transition (Silver and Slater 1999). The rising hegemon is able to do this in the virtuous period of expanding trade and production, resulting in both the building of a larger middle class than was previously able under the preceding hegemon, as well as establishing a legitimacy through the successful ability to conflate the elite's interests with the nation's or people's interests. Yet other groups are inevitably excluded from this expansionary period of rising inclusion. The discontent of these groups are the result of the necessary racism and sexism needed within the system of historical capitalism. These racist and sexist trends are hidden by the world-system's liberal universalist ideological claims (which I deal with in chapter 4). As the Kondratiev cycle inevitably moves into its B-phase with its characteristic increase in financialization, the threatened middle classes add strength to the voices of the dispossessed status-groups leading to a crisis in legitimacy. As a result, the elite interest can no longer be rationally justified as serving everyone's interest:

the growing 'financialization' of processes of capital accumulation during each transition was associated with a rapid and extreme polarization of wealth, which in turn undermined the 'middle class' consent upon which the world-hegemonic order rested. Part of the force behind the growing social conflict of the transition periods comes from the efforts of these 'middle' strata to defend the privileges they had enjoyed under the hegemonic social compact... For each transition period we [see] the unraveling of the old order under the impact of escalating social conflict and the emergence of a new social order capable of bringing the conflict under control through a combination of cooptation and repression (Silver and Slater 1999, 151-152).

Racialization moves alongside *proletarianization* in these transition processes as new groups are birthed alongside the unfolding of historical capitalism. For example, this is how the the construction of "white" in America was achieved. Before the labor movements in the late nineteenth and early twentieth centuries European immigrant populations were not white, but Irish, French, Danes, and Finns. The category white comes in to separate a newly co-opted working class group from the black populations moving north at this time during the "great migrations" of African ex-slaves to the northern industrial centers (Wilkerson 2011). As working class whites gain privileged treatment in the expanding American hegemon in the post-World War II period, minorities of color are further alienated from the means of production. This cooptation of working class males also affected women who made up a substantial portion of the industrial labor force in the nineteenth century. They are also excluded in this cooptation as more and more men gain priority access to these now privileged manufacturing jobs under the new science of production, Fordism. Women and people of color get assigned further down the supply and production chain where benefits and job compensation are less, or take less secure jobs altogether in other sectors, most emblematically the service sector. As in previous transitions: a "new world hegemony — if there is to be one — will have to come to terms with

the growing size and centrality of women and people of color among the workers of the world" (Silver and Slater 1999, 153).

3.4. Where is the World-System Now?: Globalization in the Context of Hegemonic Disintegration

Few phenomena exemplify the core-periphery relationship within the present global interstate system as well as vulture funds. Although there was nothing in international law which stated that private firms couldn't take a sovereign government to court, before the 1990s it simply was not done. The first of such cases is emblematic; Elliott and Associates L.P. bought \$28.7 million worth of Panama debt at the discounted value of \$17.5 million, and in 1995 brought the country to court in an American civil case which found in favor of Elliot: "[t]he fund obtained a judgement and attachment order, ultimately receiving over \$57 million in payments with interest included" (Sassen 2006, 272). This set a precedent and a template for future US firms to make billions off of buying discounted debt from poor countries and using US courts to force full payment plus interest. In these cases you see (1) the ability of the free-enterprise system of firms within the core country, in this case the US, to (2) exploit through the mechanisms of debt the periphery, using (3) the state-machinery in the core country to rule in favor of the core firms.

Similar relations between firms and countries are established in free trade agreements. Lori Wallach, executive director of Public Citizen, highlights how corporations sue governments under these agreements for regulations that result in *future* lost profits and market share. This is done under the controversial "investor-state" tribunal system. In the case of the North American Free Trade Agreement (NAFTA): "More than \$360 million in compensation to investors has been extracted from NAFTA governments via investor-state tribunal challenges against toxic bans, land-use rules, water and forestry policies and more. More than \$12.4 billion are currently

pending in such claims" (Public Citizen 2014, 5). Furthermore, the promises that corporations make in pursuit of these agreements never materialize; of the 170, 000 jobs a year that corporations promised in the US leading up to the establishment of NAFTA in 1993, over a million jobs have been lost since the first ten years due to the mobility of corporations to "near shore" manufacturing jobs to Canada and Mexico. NAFTA is enormously unpopular with fifty-three percent of Americans stating that the US should do whatever it takes to leave NAFTA, while only fifteen percent believe that the US should continue to be a part of it. The support for the new Trans-Pacific Partnership (TPP) is even lower with a four to one ratio saying they wouldn't vote for a member of congress who voted to fast-track the deal. Aware of public opposition, the powers negotiating the trade deal have made it secret, but portions of the text was leaked by Wikileaks, confirming fears that the TPP is "NAFTA on steroids":

NAFTA was an experiment, establishing a radically new 'trade' agreement model. NAFTA was fundamentally different than past trade agreements in that it was only partially about trade... The same sweeping terms are proposed for the TPP, a massive agreement with 11 Asian and Latin American countries that is premised on expanding the scope of the NAFTA model. It also contains terms that would more deeply infringe on domestic policy matters that directly and tangibly affect American's daily lives (Public Citizen 2014, 2).

"Fast-tracking" is a US procedure that would circumvent congressional debate on the TPP in favor of an executive decision. Peter Mair, in his last work before he died, *Ruling the Void: The Hollowing of Western Democracy* (2013), notes a growing trend in placing economic and financial decision making in the hands of the executive branch of government and in unelected central bank officials. His work focuses on the EU, but he states that all of these trends are to be found in most countries since the collapse of the Soviet Union. Basically, economic policy is deemed too important to leave in the hands of elected officials and should therefore be decided by "experts" and "technocrats." In reviewing the political science literature

on how they justify these trends, Mair notes that "the contemporary scholarly literature is awash with the various current meanings of democracy and the many different nuances of legitimacy, such that any system of rule can be found to be acceptable — even that by judges and their equivalents" (Mair 2013, 137). This has led to "euroskepticism" and has birthed popular support for extreme parties on both the left and right. Again, "the party of Wall Street with two faces" (David Harvey) and the "extreme center" (Tariq Ali) no longer seem to hold popular legitimacy, a major feature of systemic chaos during periods of hegemonic disintegration. What Ali and Harvey mean by their phrases is that no matter what party is elected to office, whether the traditional socialists in France and Greece or the conservatives in Britain or Christian Democrats in Germany, all parties basically support economic liberalization while evacuating economic policy decision-making into an elite sphere of central bankers who mostly follow the policy recommendations outlined by the financial sector or the various international institutions such as the IMF and World Bank. Extreme right and left parties are the only ones to emerge with the courage to stand up to the Euro zone project and challenge the direction it is taking.

The resulting polarization is a key feature of hegemonic breakdown to world-systems scholars. In the last transition from the British to the US hegemon, the financial crisis of the late 1920's led to the depression of the 1930s and forced popular calls for economic protectionism. The finance-driven world-economy was seen as too nationally destabilizing; the Soviet five-year plan, the American New Deal, and Fascism and Nazism were all attempts to isolate the national economies from the devastating world-economy with the use of protectionist measures (Arrighi, Hui, Ray, and Ehrlich Reifer 1999, 81). In the case of Nazism and Fascism, this economic nationalism was tied to a right-wing ethnic nationalism.

These economic and trade policy regimes represent what Saskia Sassen has named "denationalized state agendas" (2003; 2006), stressing that although these economic policies tend to be described as an inevitable part of globalization, they cannot rationally be said to fulfill any state interest or international benefit. Instead, they merely help a handful of global financial players and business interests. In world-systems analysis, periods of financial expansion are periods of hegemonic decline, as the accumulators of capital utilize the instruments of finance to redistribute wealth to themselves at greater and greater levels. In both the cases of free trade and vulture funds, what we see is an "expulsion" of the idea of national sovereignty from the organizing logics of the world-system (Sassen 2014).¹⁰ This concern has been most prominently voiced in Joseph Stiglitz's work *Globalization and Its Discontents* (2003), written as a type of exposé on what he calls the "free market ideology" of the "Washington Consensus" which he saw operating at the IMF and more specifically the World Bank under his tenure there as chief economist:

The fact that so many of the success cases followed strategies that were markedly different from those of the Washington Consensus is telling. Each time and each country is different... But countries need to consider the alternatives and, through democratic political processes, make these choices for themselves. It should be — and it should have been — the task of the international economic institutions to provide the wherewithal to make these *informed* choices on their own, with an understanding of the consequences and the risks of each (Stiglitz 2002, 88).

The IMF and World Bank were set up in the aftermath of WWII under the Breton Woods agreements. While the Marshal Plan bailed out the post-war economies of Europe, it was agreed

¹⁰ Sassen uses the term expulsions in two way, first is the expulsion of national sovereignty from nation states as a result of transnational capital flows, while the second is akin to sociologist Zygmunt Bauman's (2004) "human waste" (wasted humans), people who are expelled from the system through a new brutal form of capitalist development centered on globalization led by high finance. In the past there were always exclusions (women, people of color, etc) but the organizing logic of the system was to bring people in as they were necessary as consumers. Under this new phase people are being expelled from the system. The global rise of prisons, land grabbing leading to huge increases in urban slums, and transnational illegal flows of migrants are all symptoms of these expulsions.

that decolonizing developing countries would gain financing for their projects through these new global agencies. Originally set up as a type of international New Deal, the Breton Woods system helped solidify the transfer of the world monetary system to the US from Britain. It also brought a return to financial regulation into the public hands of Washington, even against the wishes of the Wall Street bankers at the time (Arrighi, Hui, Ray, and Ehrlich Reifer 1999, 86-87). Such a planned public sector strategy was necessary to compete with the development alternatives posed by the newly constructed Soviet threat and made the Breton Woods institutions in this early manifestation (between the 1950s and 1960s) relatively labor-friendly, at least to core country labor (Arrighi and Silver 1999a, 12). As the Soviet Union lost its strength in the 1980s, the Breton Woods institutions moved into a new phase as the World's debt enforcers (Graeber 2011, ch.12).

To world-systems scholars the economic restructuring of Latin American countries in the 1980s represents the test case later followed in all developing states (Arrighi and Silver 1999a, 7). What makes the Latin American debt crisis particularly egregious is that the massive debts were accumulated in times of surplus by Western backed right-wing dictators, while Western global economic institutions later descended on each country demanding "structural adjustment." Structural adjustment programs (SAPs) basically represent the commitment of states to cut social services to the public while privatizing state run industries under the ideology of becoming "fiscally responsible." What was resisted by popular movements against the dictators, was easily accomplished by the foreign interests under the disciplining ideologies of debt. Under the disciplining regime of debt, unpopular changes to countries' structural programs can be made in times of "peace" and "democracy," while in the past such plunder was only possible in war and dictatorship. Debt servicing, merely keeping pace with the accruing interest on national debt,

has increasingly taken up larger and larger percentages of each country's GDP. In many cases, most notably in Africa, these debts have been repaid four or five times above the principal through interest payments made over the last two decades. In other words, these debts function as imperial tribute systems; in the most extreme example, Belize devotes 28.1 percent of its government revenue to debt servicing (Sassen 2014, 28). In the past, tributary systems benefited imperial state powers — we can think of the Congo Free State under Leopold II of the Netherlands or the case of India under the British Raj. At present, however, such measures are working toward the benefit of foreign banks and financial firms.

Although "balancing the budget" has been an economic priority advanced by various Western governments since the 1980s, with the crash of 2008 the disciplining regime of debt in the form of structural adjustment has come to the global north. As Mark Blyth (2013) notes in his history of the development of austerity policies, in 2008 governments were forced to bail out their financial sectors and then within a year that cost was directly leveled against average citizens through structural adjustment. Under the framework of "sovereign debt crises," Western developed governments have had to abandon their social programs, public sector employment strategies, and numerous other benefits that were features of the welfare state which were developed in the Cold War period during the era of competition between communism and capitalism¹¹ (Lazzarato 2012 and Roos 2013).¹² With the antisystemic movements structurally

¹¹ Also the A-phase of the US Kondratiev cycle.

¹² Maurizio Lazzarato's work on debt is particularly interesting in how he says the class struggle in capitalism has been "deterritorialized" through the mechanisms of private debt (2012, 161). In the 1960s and 1970s the expansion of the financial instrument of the thirty year mortgage and a public relations campaign changing perceptions about the higher quality of private post-secondary education all helped indebt Americans. There seems to be a political end for these projects as studies conducted during this time showed that debt incumbent home owners don't go on strike and indebted students don't protest. In other words, debt individualizes social problems and creates the perception that the individual is irresponsible and is to blame for his or her own failings. Jérôme Roos' work shows how this mechanism is transferred to the national state, again fulfilling the aim of changing the public view that as citizens of a country we have been irresponsible and need to "tighten our belts."

defeated, the alternatives that forced capitalism towards more inclusive development have been erased under the pretext of balancing the budget. Furthermore, these scholars note that at a basic level sovereign debt problems are not about overspending but revenue collection. The two-part problem of tax cuts to corporations and rich individuals and the lack of political will to go after tax evaders/avoiders (which I mentioned in the previous chapter) are features of this problem; that is, the inability of states themselves to deal adequately with the newly emerging global anti-state actors. The issue of state sovereignty comes back into play here, as the inability of the modern state to enact autonomous economic policies strikingly shows the weakness of states to challenge these new anti-state global financial forces.

Beverly Silver and Giovanni Arrighi conclude *Chaos and Governance in the Modern World-System* with five propositions. (1) The growing financialization we have witnessed since the 1980s is not evidence of a growing "hegemony of global markets" (or a "tyranny of the market"), but is rather a sign of US hegemonic breakdown and transition and has been a feature of all previous transitions. (2) The unprecedented centralization of military power in NATO and the sheer level of financial power is a novel development, and leads to a further delegitimizing on the claims of factual sovereignty based in the Westphalian "balance of power" principle. This means that there is not likely to be a large-scale war between major military powers in the transition away from US hegemony, but does signal that the present systemic crisis will continue in a prolonged manner.¹³ (3) As mentioned in the opening of the chapter, the transnational or

¹³ I did not include the vast world-system analysis work on the issues of war and military industrialization. But it is perhaps important to note that the expansion of NATO after the disbanding of the Warsaw Pact is described in the literature as a way to enforce global economic liberalization policies in the post-Cold War era. The US pledged in the Malta agreements (1989) that it would not expand NATO east of Germany; this outright lie, alongside the failed transition and the collapse of almost all post-communist economies, has led to a general public sentiment in these regions of being duped by the US. This sentiment moves alongside a radical anti-Western feeling that characterizes the present crisis in the Ukraine and Russian Federation and has led to the popular rise of Vladimir Putin. This history is recounted in the work of Jack Matlock (1995 and 2010), the last US ambassador to the Soviet Union, as

"denational" forces of global firms and corporations is a novel and probably irreversible feature of the present disintegration, and will play a role in the rise of the next hegemon. These new anti-state forces represent a general, "but by no means universal, disempowerment of states" (Arrighi and Silver 1999b, 278). (4) The defeat of the antisystemic movements, particularly organized labor, means that a coming wave of unorganized social conflict is likely and can be expected to "reflect the greater proletarianization, increasing feminization, and changing spatial and ethnic configurations of the world's labor force" (Arrighi and Silver 1999b, 282). Further, (5) the rise of China presents a possibility for either the emergence of a "commonwealth" or "mutual destruction" of world civilizations. This choice depends on two factors: one is how well the Western powers will accept a less exalted world status; and second, how well the East Asian powers can rise to the task of "providing system-level solutions to the system-level problems left behind by U.S. hegemony" (Arrighi and Silver 1999b, 286).¹⁴

I have already dealt with a number of these propositions throughout this chapter, but with regard to proposition 4 we have seen since 1999 a new wave of anti-colonial struggle in the global south. Canadian mining firms have been a particularly egregious actor in this regard, especially in their behavior in Central America. These conflicts are regularly covered in the foreign press in publications like *The Guardian*, *The Independent*, *Der Spiegel*, and *Al Jazeera English*. In Canada the only report so far has been the CBC National's "The New Conquistadores" (June 2012), which resulted in the Conservatives defending the mining companies against the CBC report through a base-level nationalism stating that these are our companies and they provide good Canadian jobs. Yet the fight of indigenous people in Canada

well as Stephen Cohen (2009). See also Hinote, Cockerham, and Abbott 2009 for a review of the literature studying the decline in health and diet of former communist countries after the transition to capitalism. A commonly repeated statistic is that one in three Russian men now never live past sixty years of age.

¹⁴ The BRICS states (Brazil, Russia, India, China, and South Africa) in 2014 set up their own development fund as an alternative to the IMF and World Bank.

itself has also emerged and joined forces in a larger American (North and South) struggle against "neo-colonialism" and the rise of a new era of plunder linked to the extraction of natural resources and land.¹⁵ Indigenous resistance against the neoliberal policies leveled against Latin American countries has helped bring about the successful rise of the regime of Evo Morales in Bolivia and Hugo Chavez in Venezuela. The model of "Bolivarian Socialism" (or the ALBA states) that these leaders represent has helped unify the Latin American continent and has led to an expression of economic sovereignty not witnessed since the rise of the US hegemon in the area.

The grassroots movements that helped make Latin America coup-resistant (with the exception of Zalaya of Guatemala in 2009, and Lugo of Paraguay in 2012), have all found global organizing power as part of the World Social Forum. Samir Amin himself has been one of the main founders of the forum even in its preceding manifestations. Mischaracterized as the anti-globalization movement, these networks of organizations follow along global communication flows set up by global firms themselves in a similar way that the first wave of antisystemic movements transformed into the various Internationals through the networks established by industrial capitalism. Although there are problems with these movements — as in any large collective gathering of agendas, such as who gets represented, what groups are ultimately invited, and what priorities get established — they nonetheless represent a major challenge to the legitimacy of states that pursue neoliberal development policies (Barlow and Clarke 2001;

¹⁵ Since the crash of 2008 was largely based on fraudulent financial products, the years since have seen a rise in investment into more traditional and concrete forms; mostly land for mining, water and mineral extraction, and farming. The financial firms themselves have moved into the domain of "land grabbing," a practice which saw its birth in the early 2000s under the guise of land conservation to help poor underdeveloped countries preserve their natural resources. Sassen documents these practices in *Expulsions* (2014) in chapter 2 and asks the question: what happens to national sovereignty when a foreign firm can buy 200,000 hectares of land from a small African state? For documentation on the links between finance and land grabbing see also Friends of the Earth 2012; Jaatee and Mulataa 2012; McKeon 2013; Sindyiga 2011; and von Braun and Meinzen-Dick 2009.

Chomsky 2013; Harvey 2006; and Routledge and Cumbers 2009). Furthermore, both Podemos in Spain and Syriza in Greece draw their influence from the success that the democratic Bolivarian socialist model has set in reaffirming sovereignty in the task of developing an independent economic policy agenda for their respective countries.¹⁶

Immanuel Wallerstein ends his work *Historical Capitalism* with his conviction that the world-system has led to the "absolute (not relative) immiseration of the proletariat;" a Marxist concept which even orthodox Marxists tend to discount:

I hear the friendly whispers. Surely you can't be serious; surely you mean relative immiseration? Is not the industrial worker strikingly better off today than in 1800? The industrial worker, yes, or at least many industrial workers. But industrial workers still comprise a relatively small part of the world's population. The overwhelming proportion of the world's work-forces, who live in rural zones or move between them and urban slums, are worse off than their ancestors five hundred years ago. They eat less well, and certainly have a less balanced diet... They unquestionably work harder — more hours per day, per year, per lifetime. And since they do this for less total reward, the rate of exploitation has escalated very sharply (Wallerstein 2011, 101).

Three ideological trends prevent us from recognizing this absolute immiseration of the vast majority of the world's population. First is the ideology of meritocracy, which has been strengthened with the inclusion even of different ethnic groups into the much celebrated growing middle class, especially in the decolonized global south after 1945. But taken as a whole this small inclusion of a postcolonial elite has not made a dent in the overall distribution of income to

¹⁶ The Arab Spring represented another hopeful effort to seize state power and oust military dictators. Although it has mostly failed — Egypt's military coup re-established the military dictatorship, Libya is a failed state after the NATO bombing campaign for which we still do not have casualty figures, Syria is in a civil war, Bahrain's uprising was crushed with the help of Saudi intervention as is the case with Yemen, and Tunisia has its own Islamic militant problems — its example shows that people organize under whatever alternative is available within the contingent situation, in this case Islam constructed as an indigenous alternative to Western development models. Although progressives would hope there were large-scale popular socialist organized alternatives in those countries, there is not. This is partly due to the history of the Baathist parties in Iraq and Syria and the eventual cooptation of the descendants of Nasserism in Egypt.

the bottom eighty-five percent of the world's lower classes. Second is the privileged social scientific focus on this growing middle class, exemplified in discussions on the success of the emerging market economies of the BRICS nations. This exclusive focus on the middle class is changing, as I mentioned in the preceding chapter; or rather, with the falling out of the middle classes in the Western world, a new focus on income inequality has gained ground.¹⁷ Third is the possibility that with the success of the antisystemic movements towards establishing some redistributive state mechanism in the Cold War era, we have seen a slowing down of this absolute immiseration. Yet when viewed in the *longue durée* of the last five hundred years this evolution of the state into a (presumed) agent of redress and redistribution also does not represent an absolute change in the pattern, especially since all these government programs have been severely weakened in the post-Cold War period of neoliberal economic pressure.

Furthermore:

On the face of it, far from being a 'natural' system, as some apologists have tried to argue, historical capitalism is a patently absurd one... The more I have reflected on it the more absurd it has seemed to me... So imbued are we all by the self-justifying ideology of progress, which this historical system has fashioned, that we find it difficult even to recognize the vast historical negatives of this system. Even so stalwart a denouncer of historical capitalism as Karl Marx laid great emphasis on its historically progressive role (Wallerstein 2011, 40).

It is to these historical self-justifications of progress and the ideologies of liberalism, conservatism, and radicalism that I turn to in the next chapter. I chart their birth first through the

¹⁷ I have included in my bibliography many well known and respected works on rising inequality and historical works on the topic. These include all the groundbreaking studies lead by Emmanuel Saez (Alvaredo, Atkinson, Piketty, and Saez 2013; Atkinson, Piketty, and Saez 2011; Chetty, Henderson, Kline, Saez, and Turner 2014; Diamond and Saez; Piketty and Saez 2003, 2014, and 2013; Saez 2005 and 2006; and Saez and Veall 2005), former inequality specialist and lead economist at the World Bank's research department Branko Milanovic (2011), Nobel prize winning economist Paul Krugman (1996 and 2013), and Joseph Stiglitz (2003 and 2012) another Nobel prize winner in economics. By focusing on the work of world-systems analysts I was able to provide a sociological and historical picture of the process of globalization, yet nothing in the economic studies on global inequality I just mentioned contradicts the work of world-systems analysts and even confirms their account of the unfolding of US led economic development paradigms after the Cold War and its link to the rise of global inequality.

account provided by world-systems theory, then through the "death of Marxism" after the fall of socialism, and finally to the crisis of liberalism. These three driving ideologies are the forces which have shaped Catholic social thought since its first articulation in the latter half of the nineteenth century. In the third part of the thesis this becomes clear as I outline the late twentieth century conflicts surrounding the struggle among socialist, conservative, and liberal influences in Catholic teaching and the internal challenges to Catholic social thought.

4. Ideology after the Fall of the Berlin Wall: Marxism and Liberalism

In the last chapter I reviewed the literature around world-systems theory in order to develop a comprehensive history of globalization and the state. But alongside the historical development of economic policies and trends that characterize globalization, there also arose ideologies that furthered the world-system along its world-encompassing expansion. The most potent historical discourse to achieve this was liberalism, with its claims to universalism and especially the teleological view of progress and development. Alongside this progressive view of history, which was briefly touched on in the last chapter, emerged two counter forces which sometimes worked in opposition to liberal universalist tendencies. However, more often than not these two counter narratives actually helped advance liberal aims in a complex historical relationship. One is conservatism, which is characterized by a suspicion of the claims of progress; the other is named by world-systems theorists as radicalism and includes the Marxist and socialist movements that were also touched on in the last chapter (antisystemic movements). Although not necessarily named as such, these three tendencies — liberal, radical, and conservative — have shaped human thought and action for much of Western history. But it is not until the French Revolution and its immediate aftermath that they materialized in concrete political and scholarly forms.

Through an analysis of contemporary conflicts and struggles, this chapter provides an overview of two of these trends, liberalism and Marxism. I first track the historical development of the three ideologies in the account of world-systems analysis. Next I move onto to the "death of Marxism" after the fall of the Berlin Wall. For this I will review the literature surrounding Jacques Derrida's treatment of Marxism in his book *Spectres of Marx* (1994). Written after the fall of communism, Derrida's text — along with two companion collections and numerous other

responses — reveals the climate of the academy after the historic defeat of one of the most important scholarly fields for advocating social change. Indeed, as Louis Althusser shows in his treatment of Marx's XI Thesis on Feuerbach — "the philosophers have only interpreted the world in various ways; the point however is to change it" — that Marxism, as scientific materialism, was the only philosophy to have developed a successful political program (Althusser 2001, 21).

With Marxism declared dead in the period after the Cold War, the balance of power between conservatism and liberalism shifted. Throughout this chapter I also explore the challenges facing liberalism today, specifically in relation to the academy and the "trivialization of the humanities" (Gayatri Spivak 2014). I examine the difficult collusions that liberal political institutions and scholarship made at what Francis Fukuyama famously called the "end of history," and how this complicity with power has led to its current crisis of legitimacy. This Faustian bargain saw its fulfillment in the Clinton administration at a time when the US hegemon was exercising its global dominance.¹ It is at this point that we see traditional liberal notions

¹ Latin American historian Gregg Grandin discusses how the 1989 US invasion of Panama signalled a change to US foreign policy and provided a template of US wars to come:

That the invasion of Panama took place a month after the fall of the Berlin Wall, and it really set the terms for future interventions in a number of ways. One, it was unilateral. It was done without the sanction of the United Nations, without the sanction of the Organization of American States, which was a fairly risky thing for the United States. It didn't occur often, even during the Cold War. Two, it was a violation of national sovereignty, which of course the United States did often during the Cold War, but it was a violation—the terms of the violation changed. It was done in the name of democracy. It was argued—it was overtly argued that national sovereignty was subordinated to democracy, or the United States' right to adjudicate the quality of democracy. And three, it was a preview to the first Gulf War. It was a massive coordination of awesome force that was done spectacularly for public consumption. It was about putting the Vietnam syndrome to rest.

No longer having to worry about Soviet criticism or the Cold War balance of power, the US launched "Operation Just Cause" which saw the deployment of around 24,000 US troops against a small country with an army smaller than the New York Police Department. This was all done in order to arrest one man, Manuel Noriega, a dictator that the US no longer supported. "'How the Iraq War Began in Panama': 1989 Invasion Set Path for Future US Attacks." Democracy Now, December 23, 2014; accessed July 15, 2015, http://www.democracynow.org/2014/12/23/how_the_iraq_war_began_in

such as "democracy" and "human rights" increasingly being used as alibis for military interventionism.

The interplay between these three political ideologies are integral to understanding the changing tides of the Catholic Church's social teachings in the twentieth century. The trends and movements within modern Catholic social thought are more easily understood by first defining the period of globalization and its links to historical capitalism and then describing the development of the three main ideological movements birthed in the world-system. In Part Three of the thesis I show how both the globalizing of the world-system of historical capitalism and these ideological movements have affected the politics of the Catholic Church in the twentieth century.

4.1. Conservatism, Liberalism, and Marxism in World-Systems Analysis

The classificatory political spectrum of "right" and "left" emerged in the period of the French Revolution, as did the three categories of conservative, liberal, and radical. As I mentioned in the preceding chapter, popular revolt from below was necessary for the chaotic breakdown that allowed the rise of a new class power. But unlike the older class power which was based on aristocratic lines of privilege and hierarchy, this new class power was premised on a hierarchy of "careers open to talents," that is, a presumed meritocracy legitimated through reference to skill and success. In a summarized history given by Wallerstein, conservatism comes into being first as a counter-revolutionary force upholding the authority of the *ancien régime*:

Conservatives were not necessarily totally opposed to any evolution of customs and rules. They simply preached acute caution, and insisted that the only ones to decide on any such changes had to be the responsible people in the traditional social institutions... They put their faith instead in hierarchical political and

religious structures — in the large ones of course, but in a sense even more in the *local* structures: the best families, the 'community,' whatever came under the heading of notables. And they put their faith in the family, that is, the hierarchical, patriarchal family structure. Faith in hierarchy (as both inevitable and desirable) is the hallmark of conservatism (Wallerstein 2004a, 61).

Conservatives in this period rejected the newly signified concept of democracy and saw these ideas as undermining the stability of the social order which they viewed as reliant on traditional hierarchies. They also rejected calls for widespread education and saw education as important only for the training of elite cadres. Liberalism emerges in Wallerstein's account as a counter movement to the success of the conservatism that was solidified with the defeat of Napoleon in a Europe dominated by the Holy Alliance. As a reaction to the Reign of Terror of the French Revolution, "conservative ideology was on the rise everywhere after 1794..." (Wallerstein 20014, 62) . In order to regroup and shed their association with the Reign of Terror, liberals acknowledged that drastic change could be counterproductive, but still insisted on the illegitimacy of traditional hierarchies. It is at this time that they resuscitated the slogans of the French Revolution — *la carrière ouverte aux talents*, and "liberty, equality, and fraternity" — into a new political ideology:

It was around such slogans that liberals built their ideology. Liberals made a distinction between different kinds of hierarchies. They were not against what they thought of as *natural* hierarchies; they were against *inherited* hierarchies. Natural hierarchies, they argued, were not only natural but acceptable to the mass of the population and therefore a legitimate and legitimated basis of authority, whereas inherited hierarchies made social mobility impossible (Wallerstein 2004, 62).

But the liberals were also suspicious of the uneducated masses. They argued that only educated *specialists* should determine the order and means of the social changes that are a natural part of the unfolding of history. However, liberals also derided traditional forms of knowledge in favor

of practical knowledge — namely science with its attendant path toward technological progress and hence also social and historical progress: ideals attributed to the birth of the Enlightenment and modernity.

On the fringe of the liberal movement prior to 1848 were dissenters: "they called themselves democrats, or radicals, or sometimes socialists" (Wallerstein 2004a, 63), and they decried what they described as the complacency of liberals toward conservatives. It was at this period that only two camps — liberals and conservatives — prevailed. But liberalism, from its very beginnings, saw itself as a moderate force for gradual change and always emphasized its "centrism" in politics. The chaotic revolutions of 1848 changed the political and ideological strategies of liberalism and conservatism, and heralded the political strength and possibility of radicalism/socialism. First, conservatives realized that the only country to escape the tumultuous revolutions of 1848 was conservative Britain. The Austro-Hungarians' repressive tactics fomented revolt while Britain's "enlightened conservatism" — strategic implementation of small reforms — actually deflated the mass appeal of radical movements. Liberals also made changes to their ideologies and entered the political realm with a new strength and effort. All European states in the late nineteenth century sought to define themselves as liberal states and thus attempted to increase access to education and health services while expanding the voting franchise and the concept of citizenship. Yet liberals themselves often feared implementing these changes for fear of a repeat of 1848:

Somewhat curiously, the liberal program was implemented to a significant degree by non-liberals... The liberals retreated somewhat, becoming timid in prosecuting their own program... The conservatives, on the other hand, decided that the liberal program was modest and essentially sensible. They began to legislate it — Disraeli's extension of the suffrage, Napoleon III's legalization of trade unions, Bismarck's invention of the welfare state (Wallerstein 2004a, 66).

The success of liberalism was its ability to force conservatism and radicalism to moderate their positions towards what Arthur Schlesinger called liberalism's "vital center." In the world-system of historical capitalism it is liberalism that triumphs ideologically and has been the dominant political force for the last two hundred years. Thus, liberalism is the main object of criticism to world-systems analysis, particularly its universalism grounded in a reference to Enlightenment science and "freedom."² Universalism obfuscates the racism and sexism produced and needed by unfolding historical capitalism. I will touch on the location of conservatism in the world-system approach and then move to some critiques of liberalism.³

Marx argued that capitalism is a revolutionary force, in that it radically alters and changes the whole of the social structure, people's lives, and even our desires. Following along a similar observation made by Gilles Deleuze and Félix Guattari in *Anti-Oedipus* (1983) and *A Thousand Plateaus* (1987), world-systems theorists advance that capitalism rearranges desire in uncontrolled ways. It is not merely the desire for products or commodities but desires for the freedoms that liberalism purports as human universals. Yet the presuppositions of such universals are made in socially contingent historical situations: these universal assumptions emerge within new classes and status groups in the interstate system of capitalist unfolding. Primitive accumulation, urbanization, and proletarianization rearrange the social structures of society in varied and uncontrollable ways. Race, sex, and even sexual orientations are

² For a detailed review of nineteenth century British liberal thought and its connections with justifying empire see Uday Singh Mehta (1999) *Liberalism and Empire*. Singh Mehta documents how even though liberal theorists at the time held fast the values of freedom, political rights, and self-determination; they used these ideas to justify British imperialism. He argues, like the world-systems theorists, that liberalism is not in contradiction to empire, but historically functions as empire's justification, particularly its coded assumptions about progress and reason. Similar dynamics are at play today in the US hegemon's interventions from the NATO bombing of Yugoslavia to stop "ethnic cleansing" (a term invented at that time), to the complicity of women's rights discourse in justifying the war in Afghanistan, to the NATO bombing of Libya to support what was at the time described as a popular movement for democracy.

³ I already discussed radicalism in the section on antisystemic movements in the last chapter but will come back to the question of Marxism later on in this chapter.

constructed within this unfolding capitalism and these identities (status groups) emerge out of the changed social realities that shifting relations to production inevitably bring about. This is what is meant by the racism/sexism needed and produced by the world-system. These groups then fight for rights and recognition within a liberal or radical framework depending on the situation. Conservatism comes into play as a force of repression and a not-always-conscious supporter of capitalist class power.

Instead of seeing the changes that capitalism produces, and these different groups as symptoms of capitalist social rearrangements, conservative institutions resist the demands these groups make on the social system. Conservatives do occasionally attack capitalism when it is named as such; but for the most part they minimally attack greed, consumerism, and the like, and oftentimes project the causes of hegemonic decline onto the lower status-groups themselves. We see this presently with gays and the resuscitation of an older discourse of decadence: that rights granted to homosexuals are the harbinger of civilizational decline. Yet, with the example of gays we see that homosexuality has always existed⁴ but an urban movement based on changing social structures necessitated a struggle to wrestle certain securities and protections from capitalism: the homosexual of the past becomes the LGBT political subject in the 1960s (Valverde 2006).

Securities centered around job security and safety from physical attacks became necessary, as homosexuals as a group became political and cultural targets in the Cold War period. It can also

⁴ There is a whole range of new historical studies on homosexuality and homosexual relationships in early labor settings such as mining and lumber camps in the nineteenth and early twentieth century. Nayan Shah (2005) shows how sodomy cases against Sikh migrant laborers were used in the historical construction of heterosexual white male normalcy in America. These cases produced sodomy as an oriental depravity that contaminated white vagrants. Shah states that capitalism produced a "spatial borderland" in which "lowdown" white adolescents mingled with migrant laboring men in the boarding-houses, ranches, back alleys, and streets blurring the liberal state's lines between public and private (Shah 2005, 704). Sharon Marcus' 2007 work *Between Women* is a study of female friendship in Victorian England. Marcus shows that when John Stuart Mill was advocating for a change in British divorce laws so that marriage could reflect more of a friendship or a contract that can be freely entered into and left, he had in mind many of his friends in "female marriages:" publicly open same-sex relationships. In letters to these women, many of whom were his close friends, it is clear that the equality of these partnerships began to reflect an ideal to Mill (Marcus 2007, 211).

be argued that the present increasing necessity of dual income households contributes to the drive for marriage equality. Conservative institutions, most often under the guise of religions, have sought to limit such freedoms. They attack gays and lesbians for altering society, while ignoring capitalism as the historical agent that unleashes such change, rearranges desires, and alters social structures. In this way, capitalism is a larger threat to "the family" than any radical queer group could ever hope to be; but minorities are easily scapegoated in the chaos of constantly shifting social arrangements.⁵

In the struggle for women's rights and the birth of feminism, shifting relations of production, proletarianization, and urbanization force a greater need for family planning and access to abortion as a means of survival under capitalist socio-economic pressures. And once again, conservative ideological paradigms cast these survival mechanisms as the cause of social problems, redirecting blame away from capitalism's revolutionary changes and obfuscating such changes by labelling feminists (an emerging status-group) as the primary agent of social disintegration.

The example of paperless Latin American migrants in the US is perhaps a more clear case. Under NAFTA, highly state subsidized US corn flooded the Mexican market, displacing millions of small farmers. In the first year after NAFTA's implementation, migration from Mexico more than doubled; and the total number of "undocumented" workers went from 4.8 million in 1993, to 11.7 million in 2012 (Public Citizen 2014, 22). Conservatives rarely, if ever, blame NAFTA or even the large agribusinesses that have become absolutely dependent on this cheap illegal labor; instead conservatives attack the migrants themselves. Threats to electrify the

⁵ See also Lisa Rofel's *Desiring China: Experiments in Neoliberalism, Sexuality and Public Culture* (2007), in which she highlights the emergence of an Americanized gay culture as well as rearranged class and family structures in China in the period after the 1990s market reforms of Deng Xiaoping.

border fences, legislation to remove Mexican studies from state core curricula (in Arizona most famously), and now even the warehousing of "illegals" in border prisons run by for-profit private companies all show how the victims of capitalism are attacked and blamed for the disruptions that capitalism itself creates. Secondly, around this issue conservatives constantly rally around the threat to the established white American majority that migration threatens to displace. In world-systems analysis however, the conservatives may be more vocal in their opposition to these groups; but it is liberalism that is more egregious in terms of its overall influence and its progressive mask.

To summarize, capitalism unleashes chaotic social change which conservatives claim to abhor, but blame the groups themselves in the changes they might successfully make in their attempt to struggle for equality under the new situations. In this way conservatism becomes the (unwitting) advocate for reactionary capitalism, increasing and justifying violence against these already marginal populations. The present US case is perhaps a more extreme conservatism than its past manifestations. "Unwitting" could perhaps be used to describe the conservatism of the early period after the French revolution or even in earlier American periods. That certainly doesn't seem to be the case in the US today, as the examples of the abhorrent behavior of Charles Keating or of the 2016 Republican Primary candidates has shown.⁶ Conservatives in the past talked openly about the importance of tradition, order, and hierarchy; in the present US context that discourse never fully materialized partly because the American hegemonic situation had no royal families, and Protestant Americanism had no hierarchical Church structures (Bellah 1975 and De Tocqueville 2003). In this way the American hegemon has become traditionally liberal

⁶ Yet even today the republican's "bark is worse than their bite:" Deportations under the Bush administration were actually quite low compared to Clinton, while Obama has been dubbed the "deporter-in-chief" for the record number of deportations under his administration now totalling over two million in six years.

in that capitalist class power, as justified by American conservatism, rests on a meritocratic ideology. This historical evolution shows how easily the lines between liberal and conservative shift in the world-system; indeed, the popular use of the terms "neoliberal" and "neoconservative" overlap and are often used interchangeably to refer to the same policy regimes. Yet the new hierarchy that the American conservative institutions supports are large successful businesses, elite American families, and multinational corporate interests.⁷ Though not as publicly stated as the old defense of the Church and *ancien régime*, this support is seen in the outcomes of the economic policies enacted over the last thirty years.

4.2. Liberalism in the World-System: The Use of Universalism in Masking Racism and Sexism

Racism is not merely xenophobia and sexism is not only the domination of men over women; but in historical capitalism both represent a complex dynamic in relation to the historical system:

Historical capitalism developed an ideological framework of oppressive humiliation which had never previously existed, and which today we call sexism and racism... Sexism was the relegation of women to the realm of non-productive labor, doubly humiliating in that the actual labor required of them was if anything intensified, and in that productive labor became in the capitalist world-economy, for the first time in human history, the basis of the legitimation of privilege. This set up a double bind which has been intractable within the system. Racism was not hatred or oppression of a stranger, of someone outside the historical system. Quite the contrary, racism was the stratification of the work-force inside the historical system, whose object was to keep the oppressed groups inside the system, not

⁷ The policy movement in North America reflects a similar historical ideological development. Liberal technocrats operate within the official spheres of the public sector, while conservative think tanks push their own heavily industry funded research; some examples include The Fraser Institute and The Preston Manning Center in Canada; The George C. Marshall Institute, Heritage Foundation, and The American Legislative Exchange Council [ALEC] in the US. Radical, socialist, or populist think tanks (Canadian Center for Policy Alternatives [CCPA] and The Broadbent Institute) rely on modest grassroots funding campaigns from individual donors and are heavily reliant on their charitable status for tax deductible donations (Brooks 2007 and Dobuzinski, Howlett, and Laycock 2007). This disparity of funding is striking. For example the 2012 Preston Manning Convention listed as official sponsors The Walton Foundation (Wal-Mart), Exxon Mobile, The Canadian Association of Petroleum Producers (CAPP), and scores of other multinational corporations. One of the Panels on the first day was entitled "How To Break Up Canada's Health Care Monopoly."

expel them. It created the justification of low reward for productive labor, despite its primacy in the definition of the right to reward (Wallerstein 2011, 102-103).

Although these relationships have been constantly rearranged, this rearrangement only signals the systemic chaotic upheaval of this phase of capitalist expansion. Samir Amin uses the term *pauperization* (the systemic creation of abject poverty in the historical system) to refer to these new trends; that although women make up a significantly larger population in "productive labor", the wages for these jobs are moving toward lower levels of compensation. Liberal ideology masks the disparity of these developments through reference to certain universals and notions of progress, and this ideological justification has been a constant feature of the historical system. Ethnic tensions that arise alongside capitalist development are decried under liberalist frameworks as past tribalisms and sectarianisms that will be overcome with further future development. The historical record however shows a different dynamic. According to Amin: "In its globalized expansion, the really existing capitalism has always fostered inequality among peoples. Such inequality is not the outcome of circumstances peculiar to any given country or time; it is the product of the immanent logic of capital accumulation" (Amin 2004a, 6).

American liberals share the same basic teleological assumptions about US progress and Western freedom as the advocates of "the historic mission of the United States:"

Accordingly, they present American hegemony as something benign, the source of progress in moral scruples and in democratic practice, which will necessarily be to the advantage of those who, in their eyes, are not victims of this project, but beneficiaries... But beyond this, people in the West are persuaded that because the United States and the countries of European Union are democratic, their governments are incapable of ill will, which is reserved for the "bloody dictators" of the East. They are so blinded by this conviction that they forget the decisive influence of dominant capital interests. Thus, once again [as in earlier imperialist periods], people in the imperialist countries believe their conscience is clear (Amin 2004a, 11).

To Samir Amin, an African economist and co-founder of the World Social Forum, globalization is the obfuscating title for apartheid on a global scale. The re-emergence of monopolization under US hegemony signals not only "uneven development," but exploitative purposeful underdevelopment. Amin categorizes five of these monopolies. (1) The various areas of technology which are absolutely dependent on rich core country spending in fields of research and development, particularly in the military but also in huge state expenditures for research and development (R&D) which can take the form of university grants and subsidies. Liberal economic discourse never acknowledges how utterly dependent this monopoly is on state support. (2) Financial flows which depend on a coercive interstate liberalization of national financial institutions to ensure its global flow and outreach. Of the only two legal institutions which can be truly called global, the General Agreement on Tariffs and Trade (GATT) and Bank of International Settlements (BIS), it is the BIS which ensures national complicity in these global liberalizing regimes.⁸ (3) The monopoly on access to the planet's natural resources which represents perhaps the most obvious example of a neocolonialist dynamic. Core-country mining firms gain the upper hand in an atmosphere which ideologically opposes any formation of national industries in the sense of "nationalized" (not private) mining operations, which would

⁸ Of course liberalism and liberalization are referring to related but different ideas. Liberalism is the ideological discourse that I have been outlining, while liberalization refers to a policy program carried out to ensure the free-flow of capital around the global, in this context finance capital. Both claim to be valuing freedom — liberty — but this is a mask for the spreading of inequality according to world-systems theorists. For the Canadian case against the Bank of Canada's complicity with the BIS filed by COMER (Committee of Monetary and Economic Reform) see www.comer.org. The case was filed by famed Canadian lawyer Rocco Galati and alleges a conspiracy between the Bank of Canada and the IMF and BIS in that the Bank of Canada Act legislated during the great depression to provide interest free lending for all Federal, Provincial, and Municipal infrastructure and training projects. The Bank of Canada Act was unconstitutionally altered in the 1970s due to pressure from these international financial institutions (IMF and BIS). Instead of the Bank of Canada lending and creating its own money as instituted in the Bank of Canada Act, the new "modernized and liberalized" dynamic forced Canada to borrow money from foreign banks scrapping any notion of sovereignty in monetary and financial matters. This Canadian example is emblematic of what has happened the world over in the period since the late 1970s. In the last chapter I mentioned the enormous burden that debt servicing has played in all countries; what makes Canada unique is that the Bank of Canada Act, and this legal case in particular, could provide a template for reversing these exploitative global arrangements and the resulting peonage to global financial firms. Also, the Bank of Canada is the only public central bank of the G8 countries.

represent one of the only ways that peripheral countries could develop an independent and sovereign resource management program that could compete with the transnational mining sector. (4) The communication and media monopoly both homogenize and Americanize culture. This monopoly dangerously erodes the concept and practice of democracy by new means of skillful political manipulation as expressed in the popularly dubbed phrase "weapons of mass distraction." And (5) the monopoly on weapons of mass destruction which the US "reserves for its sole use: as in 1945" (Amin 2004a, 18-19). These monopolies "produce a new hierarchy in the distribution of income on a world scale, which is more unequal than ever, subordinate the industries of the peripheries, and reduce them to the status of subcontractors" (Amin 2004a, 20).

To Amin the liberal multicultural project represents a political strategy of world governance; that is, by giving legitimacy and credit to these emerging disparate and now fractional identitarian groups in unfolding primitive accumulation, the possibility of anti-classist and unifying antisystemic movements are perpetually undermined.⁹ He concludes his piece on global apartheid by outlining this trend:

Its [world governance] objective is to ensure the maximum disintegration of potential antisystemic forces by contributing to the decline of the state system and creating as many Slovenians, Chechens, Kosovars, and Kuwaitis as possible! The use of demands for recognition and even their manipulation are welcome. The question of community — ethnic, religious, or other forms of identity — therefore constitute one of the major concerns of our era... The success of culturalism measures up to the inadequacies inherent in the democratic management of diversity — culturalism being understood in the assertion that the differences in question might be primordial, should have priority (in relation to the class differences), and are sometimes supposed to be transhistorical; in other words, based on historical invariants (this is often the case of religious culturalisms which easily lead to obscurantism and fanaticism) (Amin 2004a, 27).

⁹ I come back to this theme in the conclusion, where I treat the "world religions" discourse which shares features of the liberal multicultural project.

This critique of liberal multiculturalism highlights what Angela Davis has referred to as "difference that doesn't make a difference."¹⁰ Liberal multiculturalism is perhaps best exemplified in the 1994 work *Multiculturalism: Examining the Politics of Recognition*. Although they would be offended by being classified in the same paradigm of Fukuyama's neoconservative "end of history" argument which emerges at the same time, the liberal scholars in this collection nonetheless share some of the basic assumptions. Charles Taylor's piece highlights this:

Thus some feminists have argued that women in patriarchal societies have been induced to adopt a depreciatory image of themselves. They have internalized a picture of their own inferiority, so that even when some of the objective obstacles to their advancement fall away, they may be incapable of taking advantage of the new opportunities. And beyond this, they are condemned to suffer the pain of low self-esteem. An analogous point has been made in relation to blacks: that white society has for generations projected a demeaning image of them, which some of them have been unable to resist adopting. Their own self-deprecation, on this view, becomes one of the most potent instruments of their own oppression. Their first task ought to be to purge themselves of this imposed and destructive identity. Recently, a similar point has been made in relation to indigenous and colonized people in general. It is held that since 1492 Europeans have projected an image of such people as somehow inferior, 'uncivilized,' and through the force of conquest have often been able to impost this image on the conquered (Taylor 1994, 25-26).

The assumption in this passage is that the barriers to success have been lifted and that the poverty of marginal populations is now the result of their own bad self-esteem and inability to seize the endless opportunities available to all of us. It is assumed that conquest, colonialism, and state sponsored racism are mostly passed and that the state project should become one of

¹⁰ In the early days of the Soviet Union prior to the Second World War this was referred to as the "national question": the dilemma of unifying the disparate ethnic groups of Eastern Europe under the banner of socialism. For the most part socialism as economic equality did ease these ethnic tensions. After the liberalization of the economies of the former communist bloc these countries devolved into ethnic conflict, the most famous case being the breakup of Yugoslavia. The reign of the communist dictator Tito is now seen by the older generation as a golden age compared to the hardships that have been brought with Western models of economic development. See Cohen (2009), Freeland (2001), and Matlock (1995, 2010).

merely investing in cultural projects that focus on difference without making a difference (identity vs. class mobility).¹¹ I am quite aware that hindsight is always 20/20, and that it is only in the past decade or so that the liberal assumptions of the 1990s have been powerfully called into question; but as will become clear in the section on the death of Marxism, the positioning of liberalism at this time as the progressive left in the immediate aftermath of the Cold War constructed an academic and ideological space in which the basic assumptions between the two camps were virtually the same and mirrored the same dynamic that was occurring in the economic policy realm: that of a position with no alternative. Liberal scholarship offered a kinder version of identity politics than the conservative one, but the underlining assumptions were the same: progress, development, and "the end of racism" (Dinesh D'Souza's appropriation of Fukuyama's thesis).¹²

¹¹ Elaine Brown (2002) provides a similar critique of Bill Clinton based on a speech he gave to Black leaders and clergy after his election victory and when Newsweek named him the "first black president" in 1993. In his address Clinton states, although in a masked way, that Martin Luther King Jr. died for black people's freedom and look what they have done with it. Again the assumption is that they are now free. He then mentions the need for welfare reforms and that the government is not going to pay for unwed black mothers cheating the system (they need to take responsibility for themselves), he also calls on the need for an omnibus crime bill to clean up black communities victimized by black-on-black crime (which has led to the present crisis in black incarceration and police violence that I mentioned in the context portion of this thesis), and constantly states that America is the land of opportunity and that everyone can make it if they try. Interestingly he also notes the public concerns with NAFTA near the beginning of the talk, but states that the agreement will help prevent the off-shoring of jobs that were a major concern in the early 1990s. For the full address go to <https://www.youtube.com/watch?v=ieiD1tOLbPM>.

¹² For a treatment on the evolution from past and easily recognized state-sponsored racism to newer "privatized" racisms see Angela Davis' 2008 keynote address on the fortieth Anniversary of the assassination of Martin Luther King Jr. at Vanderbilt University Law School entitled "We are Not Now Living the Dream: Rev. Martin Luther King Jr. and Human Rights in the Twenty-First Century" at <https://www.youtube.com/watch?v=g45mEgIdxZs>. The term privatized racism emphasizes both the socially unrecognizable element of contemporary racism (it is not longer overtly "on the books") and also the social censorship inherent in the paradigm of color-blindness (when someone mentions race or race relations they risk being socially scorned or even called racist). Davis contends that the hidden undercurrents of racism still profoundly affect individuals but are only made public when racist statements are literally publicized: when someone slips and makes a racist utterance (seen as an anachronistic vestige of the past) the usual response is "I'm not a racist, I don't even know where that came from." Contemporary elements of racism are masked by complex dynamics such as criminalizing poverty and deviancy, while political and media institutions make recourse to liberal ideologies of racial progress, multicultural state commitments, and the assumption that we have achieved racial equality. this last element appropriates the figure of Martin Luther King Jr. for discourses of liberal tolerance even though, as Slavoj Žižek (2009) has noted, the word "tolerance" was not used once by Martin Luther King Jr. Also Cornel West's numerous works take up the question of the sanitizing of MLK's

In *Formations of the Secular* (2003), Talal Asad levels a number of critiques against Taylor's conceptions of liberalism and liberal secularism. I will identify two of these. First, in his introductory chapter Asad takes apart Taylor's historical schema on the emergence of the secular nation-state. To Taylor the wars of religion and the Treaty of Westphalia helped the privatization of religion and belief which was needed to develop the frameworks for the modern nation-state as an "imagined community" (Benedict Anderson), while at the same time constructing the modern democratic nation-state with two features: a horizontal, direct-access character and a grounding in secular time. The first of these rests on the assumption of participatory democracy which Asad says is not the way most people justify governance, rather "[i]t is the way ideological spokespersons theorize 'political legitimacy'" (Asad 2003, 3). In Taylor's account the direct-access character of the modern nation-state is historically supported by several developments: "the rise of the public sphere (the equal right of all to participate in nationwide discussions), the extension of the market principle (all contracts are between legal equals), and the emergence of citizenship (based on the principle of individualism)" (Asad 2003, 2-3). These principles distinguish the modern democratic state from the despotisms of the past, and provide a certain degree of responsible self-enforcement over despotic enforcement. But Asad states that this account is less than persuasive because the modern state neither governs through full compulsion (force) nor negotiation (consent), "but the statecraft that uses 'self-discipline' and 'participation,' 'law' and 'economy' as elements of political strategy" combine with skillful media manipulation, advanced responses to opinion poll data, and the influence of elites and pressure groups (Asad 2003, 3-4). Asad echoes the world-systems theorists when he says:

socialist and anti-imperialist message with tactics that include prizing "The Dream Speech" over the "Riverside Speech" ["Beyond Vietnam"], and the Civil Rights March of 1963 over the Poor People's Campaign of 1968.

The difficulty with secularism as a doctrine of war and peace in the world is not that it is European (and therefore alien to the non-West) but that it is closely connected with the rise of a system of capitalist nation-states — mutually suspicious and grossly unequal in power and prosperity, each possessing a collective personality that is differently mediated and therefore differently guaranteed and threatened... My point is that whatever the cause of the repeated explosions of intolerance in American history — however understandable they may be — they are entirely compatible (indeed intertwined with secularism in a highly modern society)... A secular state does not guarantee toleration; it puts into play different structures of ambition and fear. The law never seeks to eliminate violence since its object is always to regulate violence (Asad 2003, 7-8).

The second critique comes later in the work but is best expressed in a talk Asad gave in 2008, in which he mentions that in Taylor's entire 900-page work *A Secular Age* the word crisis is only ever used to refer to the modern malaise of the crisis of the loss of metanarratives and meaning in society:

There's no mention in Taylor's story of the global crises that threaten the world today, interestingly enough. Climate change, the militarization of space, economic collapse (this was written before the present crisis by the way), nuclear proliferation, war and terrorism, and the widening gap between the wealthy few and the many poor. The word crisis appears in his entire text... only in reference to the loss of personal meaning for believers and for a felt need for an absent narrative. But what's this [global crises] to do with religion you may ask. Well the answer is nothing; that is, nothing if religion is to be defined essentially as a matter of belief in personal salvation. And yet one wonders what happens to the possibility of narrating the self if the world in which the believing subject lives is seriously imperiled. And there's no discussion of that [in Taylor's work] unfortunately (Asad 2008).

There is also no room for uncomfortable disruption; as everyone seeks their own authenticity through religion, or now secular means, the place of an uncertain or traumatized subject is disavowed. This disavowal is crucial to Asad's critique: Taylor disregards scholars who are suspicious of the progressive claims of modernity and liberalism, while he posits the *fact* of belief (not the content of belief) as the difference between the modern "buffered self" over the

pre-modern "porous self." This centrality of individual interpretation is crucial to the way modern liberal Christianity has unfolded, and it is from liberal Christianity that Taylor ultimately constructs a redemptive history for liberal politics (Asad 2003, 60-63). But to Asad, this construction is an attempt at a narrative coherence, which has disavowed both critiques of modernity and scholars who complicate modernist claims (i.e. Bruno Latour and world-systems approaches), and also disavows the creativity of disruption — in Taylor's scheme there is no redemption for disrupted selves (Asad 2003, 186-187).

In general, liberalism constructs its own myths. Its long history and development — which includes the political exclusions of women, the propertyless, and colonial subjects — continuously redeems itself by recasting these exclusions as anachronistic vestiges of the past that the liberal project itself will overcome: "liberalism's history can be re-described as the gradual extension of liberalism's incomplete project of universal emancipation" (Asad 2004, 59). Margaret Canovan insists that liberal myths are essentially irrational: "All men are created equal," "everyone possesses human rights", and so on are questionable claims as the historical record makes clear that every group who has tried to gain recognition and rights within this universalizing framework have had to fight, struggle, and die for these rights — they are not inherent and unalienable.

The liberal project is often described in the colonial-era literature as "making a garden in a jungle that is continually encroaching..." in a "world that is a dark place, which needs redemption by the light of a myth" (Canovan quoted in Asad 2004, 59). This is the rational violence of liberal universalism:

It is the violence of universalizing reason itself. For to make an enlightened space, the liberal must continually attack the darkness of the outside world that threatens

to overwhelm that space. Not only must that outside therefore be conquered, but in the garden itself there are always weeds to be destroyed and unruly branches to be cut off. Violence required by the cultivation of enlightenment is therefore distinguished from the violence of the dark jungle [illiberal regimes]... Political and legal disciplines that forcefully protect sacred things (individual conscience, property, liberty, experience) against whatever violates them is thus underwritten by the myth (Asad 2003, 60).

Zygmunt Bauman tackles the same metaphor in *Wasted Lives* (2004) in relation to Western-led economic development paradigms: if we are creating a garden, some things will be seen as weeds that by extension have to be pulled out. To Bauman these are the "wasted lives" of malformed "human capital" that are expelled in the restructuring of state priorities to appease global market paradigms. Returning back to world-systems scholars, this is the rationalized violence of purposefully exploitative underdevelopment led by continual primitive accumulation, a dynamic which gets masked by liberal notions of progress that recodes the racism/sexism that the process itself creates in its unfolding. Racism/sexism that capitalist modernity creates are then utilized by liberal ideology and set unto a mythical narrative of redemption and eventual universal political inclusion.¹³ Michel-Rolph Trouillot calls terms such as *development, the international community, globalization, modernity* "North Atlantic universals" and states that "a successful universal tends to hide the affect it projects behind the claim of rationality... part of their seduction resides in the capacity to project clarity while remaining ambiguous... they evoke rather than define" (Trouillot 2004, 231). How could anyone not want to be modern, or why would any state not want to join the international community? Those who resist globalization or the US hegemony over the world-system are now seen as threats not just to the economic project

¹³ Gayatri Spivak (2014) has named this "sustainable underdevelopment" and asks how long can the West *sustain* the myth of development in the face of increasing evidence to the contrary? Evidence which is increasingly becoming public, even common, knowledge.

of a US which has entered an imperialist phase, but as terrorist threats to "freedom" and the truth of liberalism itself.

Pablo González Casanova outlines three periods of "neoliberal" expansion, what we can define as economic restructuring justified through liberal referents. First was the phase between 1973-1980 which saw the weakening of labor movements and unions, as well as nation-state sovereignty in economic matters: the US further weakened the Soviet bloc and ended socialist regimes around the world, while beginning the ideological project of transforming free-market ideas into general beliefs. The second phase in the 1980s saw this ideological component become dominant the world over — especially in Latin America, but also in the core countries: "moreover, neoliberalism endlessly legitimized its decisions by invoking the 'unique science' on which it was said to be based, echoing Thatcher's belief: 'there is no alternative (TINA)'" (González Casanova 2004, 97). The third phase beginning in 1993 saw the birth of resistance movements which made huge advancements all over the world, while the US state itself entered a recalcitrant and arrogant period:

It expressed its lack of desire to comply with United Nations law — its right not to meet its international commitments, together with its right to denounce, imprison, judge, and punish, out of its own jurisdiction, those it declared guilty anywhere in the world, regardless of whether they were heads of state... Those who thought that the United States was preparing to be a world policeman were underestimating its will. It was getting ready to be the world's sovereign... It created a sort of International of oligarchs, bourgeoisie, complexes, and elites that would permanently ensure the freedom of markets and the neoliberal credo (González Casanova 2004, 98).

Naomi Klein (2008) notes how after 9/11 the anti- or alter-globalization resistance movements suffered a huge set back. She herself, along with her husband, left for Latin America to film their documentary *The Take*, as Latin America was one of the few places that was

showing signs of change in combating and casting off the neoliberal model as the US moved its focus to the Middle East, South Asia, and Africa. At this time, in the US and Canada, it became increasingly difficult to criticize or mobilize against US economic policy, especially in relation to its foreign policy. González Casanova notes that the war on terror is mostly a war on poor nations and people that defend their (economic) sovereignty:

It is an updated colonial war (postcolonial) and a postmodern class war in which the empire of the G-8, G-7, G-3, or G-1 subjugates markets, governors, people, and workers at the same time as it participates in dialogue and negotiates with them so that they will contribute to their own subjugation. Their subjugation will not only be the consequence of the violence imposed on them by the empire but also the result of an agreement, of a contract in which free men and free people make a rational decision to negotiate their surrender as citizens, workers, people, firms, and governments (González Casanova 2004, 100).

In Religious Studies a number of works have been devoted to complicating the liberal secular paradigm that masks the West's liberal assumptions and the secular/religious split. These works provide another powerful critique of liberalism. In the next section I will outline the trajectory of this critique and highlight some of their concerns with how the religion-secular binary functions today before moving on to the death of Marxism.

4.2.1. Critiques of Liberalism in Religious Studies

In Catholic social thought, critiques of liberalism are older than those that come about in the discipline of religious studies. But in religious studies the emerging field of "critical religion" offers a prominent scholarly site for one critique of liberalism that I will treat here. Although these scholars are mostly known for their refusal to reify the category of religion, their root concern lies in the liberal project and its use of "religion" (Cavanaugh 2009; Fitzgerald 2007, 2011; Masuzawa 2005; McCutcheon 2001, 2003). Most of these scholars trace the trajectory of their critique to three sources; *The Meaning and End of Religion* (1962) by W.C.

Smith, *Imagining Religion: From Babylon to Jonestown* (1982) by Jonathan Z. Smith, and Talal Asad's 1993 work *Genealogies of Religion: Disciplines and Reasons of Power in Christianity and Islam*. My focus here is not so much on the category of religion, but on the binary construction of religious/secular that serves the modern liberal project. Although such a critique informs the work of all these scholars, I will highlight the recent work of Timothy Fitzgerald and William Cavanaugh, as these two best exemplify the critique for the purposes of this chapter.

In his book *The Myth of Religious Violence* (2009), William Cavanaugh explains how the Treaty of Westphalia and the end of the wars of religion function as a creation myth for the modern liberal state and its monopoly on violence. He argues that the reasons for the wars that were originally given devolved into the issue of the dangers of public religion, even though at the time of the treaty's writing people were also giving economic and political reasons for the conflicts. Yet even to say that there were economic and political reasons, not just religious ones, is anachronistic, as these discursive separations emerge later on with the setting up of the interstate system.¹⁴ I have dealt extensively with one alternative version of the Treaty of Westphalia in the last chapter with the account given by world-systems theorists. In Cavanaugh's work we have another alternative which sees the process of historically interpreting the event as a creation myth for the liberal interstate system:

This story is more than just a prominent example of the myth of religious violence. It has a foundational importance for the secular West, because it explains the origin of its way of life and its system of governance. It is a creation myth for modernity. Like the ancient Hebrew Genesis or the Babylonian Enuma Elisha, it tells a story of the overcoming of primordial chaos by the forces of order. The myth of the wars of religion is also a soteriology, a story of our salvation from

¹⁴ I treat Peter Beyer's work on the interstate system and secularism as a "differentiated function systems" that results from the liberal state project in the conclusion. It is important to note here, that the separation of the spheres of politics, economics, and religion are the result of the modern interstate project birthed at the time of the Peace of Westphalia, which many see as the birth of modernity.

mortal peril. In other words, the story of the wars of religion has a crucial legitimating function for the secular West. As such, this story provides important clues to the function that the larger myth of religious violence serves in the West (Cavanaugh 2009, 123).

This larger myth of religious violence, the main purpose of Cavanaugh's work, is the fallacy that geopolitical violence is the realm of religious groups alone; while we in the liberal West, only use violence as a weapon of last resort and only after careful (and legal) scrutiny: "In short, their [religious groups] violence is fanatical and uncontrolled; our [liberal and modern peoples] violence is controlled, reasonable and often regrettably necessary to contain their violence" (Cavanaugh 2007, 241). This discursive positioning legitimizes the liberal state's monopoly on violence.

In his critique of two main texts on religious terrorism after 9/11 — Mark Juergensmeyer's *Terror in the Mind of God* (originally published in 2000 but updated after 9/11) and Charles Kimball's *When Religion Becomes Evil* (2002) — Cavanaugh notes that there is no consideration that these (mostly Islamic) movements represent anti-imperialist struggles. To Juergensmeyer the main problem lies in religion's "satanization" of its adversaries. Even though Juergensmeyer mentions the role the US has played in propping up unpopular dictators and the concerns people around the world have expressed with globalization, these reasons are not sufficient for Juergensmeyer to understanding the "religious motivations" of un-modern groups:

The problem with Juergensmeyer's analysis is not just its sanitized account of colonial history, where America just happens to find itself associated with bad people. The problem is that history is subordinated to an essentialist account of 'religion' in which the religious Others cannot seem to deal rationally with world events (Cavanaugh 2007, 255).

These two texts represent careful scholarly treatments of the problem of violence, but Cavanaugh also shows how the justification of violent liberal interventionism comes about at the level of the

general public. In the popular press Paul Berman in 2003 called for a "liberal war of liberation... to be fought around the world," Andrew Sullivan (2001) said that the war on terror is a religious war although not against Christians and Jews, but radical Islam against "individual faith and pluralism," while Sam Harris' now oft-quoted 2004 remarks show an extreme version of this justification for liberal violence:

In such a situation, the only thing likely to ensure our own survival may be a nuclear first strike of our own. Needless to say, this would be an unthinkable crime — as it would kill tens of millions of innocent civilians in a single day — but it may be the only course of action available to us, given what the Islamists believe (Harris quoted in Cavanaugh 2007, 259).

Cavanaugh concludes his piece by stating that although

Harris's book is a particularly blunt version of this type of justification for neo-colonial intervention,... he is by no means alone... Indeed, Harris's logic is little different in practice from the Bush doctrine that America has access to liberal values that are 'right and true for every person, in every society', that it must use its power to promote such values 'on every continent', and that America will take pre-emptive military action if necessary to defend such values (Cavanaugh 2007, 260).

To the scholars of critical religion, "religion" as a category comes about in the colonial period as a tool for colonial administrators to classify and conquer the different groups now under their jurisdiction, using the category to distinguish groups in need of the civilizing mission while maintaining the universalism of liberal theories (see also Singh Mehta 1999, 51). In a number of his works Timothy Fitzgerald unveils what liberal universalism masks in its religious/secular distinction. Religion to Fitzgerald represents a mystification that has a double function in reifying the identities of cultural groups as something sacred, not just in religious terms but sacred in terms of liberalism's values of freedom and tolerance; and it also mystifies the presuppositions of liberalism itself by obfuscating the assumptions underlying its developmental trajectory: namely capitalism and a rationally deified market. "Religion" is

irrational and requires "faith;" our ideas about economics and free markets are scientific and justified through Enlightenment science and modernity with its recourse to testable and discernible truth. In *Discourses on Civility and Barbarity* (2007) Fitzgerald writes:

I ask rhetorically, but with serious theoretical intent, why should the legal procedures and taboos surrounding our courts and ideals of justice, our separation of the branches of government, our concept of private property, the practices of the stock exchange and the capital markets, the traditions of the civil services, be considered 'nonreligious' ... Why are transcendental values such as the belief in progress, or individualism, or nationalism, or the democratic virtues of 'freedom' and 'equality', the practice of secret ballots and elections of governments, many of which millions of people died to establish and institutionalize, not be included in books on 'religion'? Why should state institutions that defend the freedom of Americans such as the Pentagon, the White House, and the Congress be treated as nonreligious rather than 'religious' or ritual institutions?... Arguably, they are all both religious and secular, and in that sense neither, for they undercut this grand dichotomy. We need to dissolve these reified binaries if a new paradigm is to have a chance to get articulated in public discourse (Fitzgerald 2007, 38).

In a later work, *Religion and Politics in International Relations* (2011), Fitzgerald expands this rhetorical question. By way of a critique of liberalism in the field of international relations he takes aim at economics in world politics as a mystified field that legitimizes liberal policies. In line with Cavanaugh's observations, he holds that the religious/secular split functions to tie unreason to cultural ideas of certain groups, while secular liberalism, particularly the "science" of economics, gains a veneer of unquestioned truth. In this light, present discourses of economic development reiterate past colonial discourses of civility and barbarity, merely updated through a new rhetoric on development. In the introduction Fitzgerald states that one aim of the book is to affirm the old Marxist critique of political economy and bring that critique into the study of religion:

Is there or is there not a connection, however indirect it might appear, between our discoursing on religion and religions, on the one hand, for example the facile

linkage of 'religion' with irrational terrorism; and on the other the use of economic theory to justify the brutal conditions of sweatshop labour, not much different from slavery, operated by vastly wealthy capitalist corporations and corrupt elites? The arguments underlying this book do not definitively reveal such a linkage, but raise the subterranean connection of religion as a classification with the naturalization of capital and economic theory (Fitzgerald 2011, 15).

In chapter 7 of the text he looks at Eli Berman, Gary Becker, and Laurence Iannaccone's economic treatment of religious groups and terrorism. Becker and Iannaccone are "Chicago School" economists who heavily influence Berman's work in *Radical, Religious and Violent* (2009).¹⁵ What is important for our discussion is how this work reifies the secular/religious distinction by feigning a perplexity on why religious people would sacrifice personal motivation and happiness to be a part of these groups. In constructing an economic explanation of religious solidarity and terrorism Berman fulfills the liberal project's goal of legitimating economics as an unquestioned science. Fitzgerald counters with a number of points. First, "faith" is just as important to the functioning of these "rational" markets as it is with religions; when a company or currency loses investor confidence it crashes and this has little to do with numbers and science and everything to do with image and how a country or company projects itself (Fitzgerald 2011, 119 and 142). Second, by unquestioningly taking up the secular liberal assumption of human beings as "rationally self-interested maximizers" and casting religion as an irrational force that curbs this nature, Berman himself is advancing the American capitalist view of the human person by putting these historically contingent categories beyond questioning (Fitzgerald 2011, 127). Third, Berman and Iannaccone are constantly surprised by the way the individual must sacrifice

¹⁵ Naomi Klein (2008) calls the advocates of this economic model the "Chicago Boys" and traces the birth of neoliberal free market policies to this school of thought. In the 1980's many of these scholars won Nobel prizes and hence gained a prestige that helped legitimate the unfolding of neoliberal economic models of development. Since the financial crash of 2008 this economic model has been discredited especially by its main proponent Milton Friedman's own admission before the US senate that it has failed. There is also the popularly named distinction between "salt water" and "fresh water" schools of economic thought as represented by the difference between Chicago and Harvard. On the European continent the "Austrian school" advances a similar model as the Chicago School.

for the betterment of the religious community. But by relegating sacrifice to religious groups alone we miss the larger ways all of us must sacrifice constantly to maintain the present social order. Fitzgerald writes:

I am not an economist, but I cannot see how any theoretical discipline concerned with social orders could assume that only small groups are based on non-coerced sacrifice. Surely the very idea of a social order must assume that everyone has to miss out on at least some of the choices they prefer. Isn't all taxation based on the idea that we all have to sacrifice personal choices in order to pay for the functioning of the state and its policies? Are not the disciplines and prohibitions of the workplace, to which most people have to submit, a constant sacrifice made in order to survive and consume?... Equally it would be perfectly meaningful in ordinary language to say that one sacrifices a significant part of one's income so that the state can pay for armed forces or old people's homes; to say that many people had to sacrifice their jobs and businesses or mortgaged homes in order to save the banks from collapse; or that the minister in charge of finance had to sacrifice the planned increase of expenditure on new prisons in order to subsidize the invasion of Iraq (Fitzgerald 2011, 131).

Fourth, Berman and his Chicago colleagues claim that Adam Smith "discovered" markets in the seventeenth century, while Fitzgerald, by recourse to the work of Michael Perelman (2000), holds that such a claim has to be placed side by side with Marx's historical analysis which states that these markets were "constructed" at the time of Smith's writing. Returning to the concept of primitive accumulation, we find at this time acts of parliament which were consistently designed to remove small scale subsistence farmers off their land in order to provide the new and much needed wage laborers for the factories and mines: "this sustained violence of capitalism is mystified by the tacit or explicit claims of Chicago School economists such as Berman that economics represents natural realities which underlie and explain all 'social' facts" (Fitzgerald 2011, 138; see also 238). There is nothing natural or *laissez-faire* about how capitalism has historically unfolded. It has consistently needed and utilized the monopoly of violence that the modern state reserves for itself. Resistance to the changes brought about by

primitive accumulation have always been met with the full force of the law; and, as I mentioned briefly in the last chapter, the punishments meted out for acts of resistance — such as strikes, industrial sabotage, and destruction of property — have ranged from incarceration to death. As with religious terrorism today, the liberal state discursively set about pathologizing labor unrest as criminal and the grievances of workers as illegitimate in relation to the state's use of violence, which was always present and on hand to enforce capitalist interests. The liberal state has, since the beginning of the interstate system, always been at the service of historical capitalism and thus the state's monopoly on violence has never been neutral.

Lastly, and like Cavanaugh's critique of scholars of religion and violence, there is no place in Berman's work about how groups like Hamas and Hezbollah see their struggle in terms of anti-imperialism, while the negative characteristics of mainstream Western society are totally ignored or masked as "the natural and largely benign growth of markets, individualism and free choice" (Fitzgerald 2011, 144):

Berman shares the wider and often unconscious need to be able to identify 'religion' as a cause of the world's problems because this deflects attention away from the massive violence of secular states in the prosecution of capitalist interests. He is mystified. This, I would suggest, is why the modern invention of religions as essentially different from non-religious secular practices is invested with such importance... The secular is the way the world really is once the illusions of 'religion' have been finally outgrown by progress. And capitalism, as part of this natural order, is merely a term for the 'natural' economy of free markets and rational self-interested individuals (Fitzgerald 2011, 146).

In the conclusion to his work Fitzgerald states that his project was to apply Marxist concepts of mystification and alienation to the secular academy. He notes that Christianity, Marxism, and liberal capitalism all share a tendency towards soteriological assumptions; indeed, many scholars have described Marxism and its political manifestation of Marxism-Leninism as a

religion, but few if any have applied that view to liberal capitalism (Fitzgerald 2011, 255). As described above, both liberalism and Marxism have positioned themselves within 'scientific' frameworks of social management and economics; but only Marxism, perhaps because of its historic defeat (or setback) has been treated as an irrational belief structure. As new challenges to the present form of capitalism begin to unfold — and Fitzgerald's represent only one of many to have emerged in recent years — a more public and popular critique of capitalism as religion/ideology may emerge. In the next section I treat the "death of Marxism" in the early 1990's through the literature surrounding Jacques Derrida's *Specters of Marx* (1994). In many ways Marxism failed not because it was wrong, but because it was right; and in its critique of capitalism, as well as its global political and military struggles, provided the strongest challenge to capitalist growth and capital accumulation.¹⁶ The challenge to capitalism that Marxism represented had to be put down, and as Derrida remarks, capitalist interests have been declaring the death of Marxism since as early as the 1950s (see also Kellner 1995).

4.3. Lost Alternatives: *Spectres of Marx: The State of the Debt, the Work of Mourning and the New International* (1994)

At a time when a new world disorder is attempting to install its neo-capitalism and neo-liberalism, no disavowal has managed to rid itself of all of Marx's ghosts. Hegemony still organizes the repression and thus the confirmation of a haunting. Haunting belongs to the structure of every hegemony (Derrida 1994, 46).

In Alexis de Tocqueville's *Recollections*, we're told of a day in June 1848. We're in a lovely apartment on the left bank, seventh arrondissement, at dinnertime. The Tocqueville family is reunited. Nevertheless, in the calm of the evening, the cannonade fired by the bourgeoisie against the rebellion of rioting workers resounds suddenly — distant noises from the right bank. The diners shiver, their faces darken. But a smile escapes a young waitress who serves their table and has

¹⁶ Many economists who declared Marxism dead in the 1990s have taken back their claims, one of the most famous being Keynesian economic historian Robert Skidelsky (2010, 2011). Skidelsky declared in a speech at the London School of Economics in 2009 that we find ourselves in the same historical conditions in which Marx first formulated his theories; namely, the worst moments of the industrial revolution in which elites and business interests were creating vast social misery and politically disenfranchising the bottom strata of society.

just arrived from the Faubourg Saint Antoine. She's immediately fired. Isn't the true specter of communism perhaps there in that smile? The one that frightened the Tsar, the pope... and the Lord of Tocqueville? Isn't a glimmer of joy there, making for the specter of liberation? (Negri 2008, 15).

In noting the ideological/"religious" character of Marxism, Marxism-Leninism, or even "scientific" historical materialism, Fitzgerald still holds onto the validity of what Derrida calls in his text "a certain Spirit of Marxism." This is the spirit of justice that Derrida calls, for the first time in this text, the only thing that is "undeconstructable" (Derrida 1994, 112). That is, identifying the injustices of capitalism, a thread that spans the entire corpus of Marx's work, constitutes the spirit of justice which, in practice, is the motivation for all of the work of deconstruction (Derrida 2008, 253). Yet Derrida's, and deconstruction's, relationship with Marxism has been fraught since the beginning of Derrida's career, and *Spectres of Marx* represents Derrida's long awaited treatment on the topic. This long absence was due to what he identifies in the early portions of the text as the totalitarian nature of the French Communist Party: the last of the European communists to denounce Stalinism even after the "Khrushchev Report." This troubled relationship with really existing communism took Marx off the table to Derrida and his deconstructionists until after the fall of communism in the early 1990's. While not one of his most influential texts, *Spectres of Marx* received widespread scholarly attention and response at the time. In this section I will review some of the points made by Derrida as to the applicability of these certain spirits of Marxism today, particularly as a lead-in to the next part on Catholic social thought. Despite his interesting formulation of the problems surrounding globalization¹⁷ and Marxism's place in it, his suggestions for a way forward are left wanting. In

¹⁷ "Mondialatinisation" (world-Latinizing or global Latinizing) is perhaps one of Derrida's most famous words. It highlights the cultural hegemony of a spreading Western influence that results in the universalization of the structures of Western language and reason.

light of this I will also review the criticisms to his suggestions on a way forward,¹⁸ namely his call for a new International comprised of academics engaged in constant deconstructionist critique (Ahmed 2008, Eagleton 2008, Plangesis 1996). I'll briefly outline three points coinciding with each of the subtitles of the book: the state of the debt, the work of mourning, and the new international.

Two things are meant by the "state of the debt." One is the state of the developing world's debt owed to the large global financial players, but now also the debt that all states owe to these banks. This debt peonage represents a major injustice and needs to be abolished according to Derrida. As we have seen in Saskia Sassen's work, these nations have often paid back these debts fourfold through interest payments undertaken by regimes that prioritize debt servicing while unable to make a dent in the principal. The second is the debt we all owe to Marx as perhaps the only philosopher who actually did change the world (recalling his 11th thesis on Feuerbach). As Thomas Piketty (2014) argues, the post-war period of the Keynesian welfare state — that brought the robust growth of a middle class due to state intervention in the economy — was an aberration in capitalism; it is not capitalism's natural progressive teleology. Liberal capitalism's norm is accumulation and "capture at the top". This aberration was only

¹⁸ Most Marxists who responded to the work praised Derrida's new gesture of affiliation (Jameson 2008, Laclau 1995, Lewis 2008, Negri 2008), while a companion volume entitled *Whither Marxism* (1995) comprises the responses of leading international Marxist scholars to the collapse of socialism around the globe (Magnus and Collenberg 1995). I focus here on the position of Marxism in the 1990s and the loss of a powerful alternative to global capitalism. Most of the responses that I gathered deal with technical distinctions in Marxist theory such as the essentialist idea of the materialist explanation of the class formation of the proletariat (Lewis 2008, Resnick and Wolff 1995, Vilas 1995), commodity fetishism (Hamacher 2008, Rorty 1995), and the history of the development of Marxist theory and practice throughout the twentieth century. For example, in her four responses — "Scattered Speculations on the Question of Value" in *In Other Worlds* (2006), "Ghostwriting" (1995a), "Supplementing Marxism" (1995b), and "Limits and Openings of Marx in Derrida" in *Outside in the Teaching Machine* (1993) — Gayatri Spivak deals extensively with the Marxian question of value. One of her few criticisms is that Derrida doesn't understand Marx on finance (1995b) (what Marx in *Capital* vol. 3 calls "abstract capital") and also collapses the distinction between industrial and commercial capital (1995a). Spivak devotes her work to correcting some of Derrida's positions on the question of value such as the surplus value that labor adds to the commodity through the production process. This work is very dense and combines the issue of price with that of the commodity fetish and the history of the discovery by Marx of the "value form." Needless to say these are highly sophisticated internal debates within the field of Marxism itself.

possible due to the communist threat; unless a deal was made with the working class (what has been called the "Treaty of Detroit"), the ruling economic elites risked being overthrown by the working class. The existence of a robust alternative forced a version of "capitalism with a human face" which after the fall of the Berlin Wall has reverted to a "capitalism in your face" (Žižek 2009).¹⁹

The second subtitle — the work of mourning — stresses a mourning of the loss of any viable and political alternative to liberal capitalism: the mourning of the historic defeat of "really existing socialism" and the triumph of the neoliberal "end of history" announced by Francis Fukuyama. Derrida states that we, as the heirs of Marxism, are in mourning. But as Aijaz Ahmed has asked, "why would Derrida be mourning?" since he and his deconstructionists positioned themselves specifically in the academy as a progressive alternative to Marxism in the same way that certain liberal scholars of multiculturalism did in the Anglo-American world (Ahmed 2008, 98).²⁰ Indeed, as Terry Eagleton notes, the American deconstructionists J. Hillis Miller, Geoffrey Hartman, and the late Paul de Man would certainly have rejected Derrida's new gestures of affiliation and filiation with Marxism, especially when Derrida states that deconstruction was always understood by him as being a radicalization of Marxism (Eagleton 2008, 84). Ahmed says that what Derrida is mourning is that in the wake of the death of Marxism, it is the Fukuyama neo-Hegelians that have emerged victorious, and not, as Derrida

¹⁹ Richard Pipes (2004), in a review of polling data on Russians for *Foreign Affairs* shows that seventy-four percent of Russians feel that life was better under communism, while only ten percent said that they would resist a communist coup (twenty-three percent said they would actively support it and nineteen percent said they would collaborate with insurgents). Only twelve percent of the people polled said that the post-communist regimes were legitimate. Other polls across Eastern Europe shows similar results. I already mentioned the nostalgia that former Yugoslavians have for Tito. What such polls show is that the "free market paradise," which anti-communist dissidents thought was coming their way, does not look so good when you are actually living in it. Also, the famous Solidarity trade union/political party that helped bring down communism in Poland is now one of the least popular political parties whose membership has dropped to around 400,000 in 2011 from ten million in the early 80's.

²⁰ Modern Catholic social thought has also claimed to be a balance between Marxism and liberalism; socialism and capitalism. This is a major theme in Part Three of the thesis.

would have liked, he and his deconstructionists. Ahmed also notes that Deconstruction, like Anglo-American liberalism, strengthened its position as a third way between Marxism and conservatism, able to retain a progressive chic and academic veneer while not calling for any economic equality or radical social changes. Aijaz Ahmed and Terry Eagleton accuse Derrida of academic usurpation; of usurping the tradition of Marxism from the Marxists — who are now discredited at the "end of history" as the losing side — while Derrida swoops down in his attempt to steal what is left of Marx's philosophical tradition. This leads us to the last point: Derrida's call for a new International.

Third, on the "new International" Derrida states that it would be an

alliance without institution among those who, even if they no longer believe or never believed in the socialist-Marxist International, in the dictatorship of the proletariat, in the messiano-eschatological role of the universal union of the proletariat of all lands, continue to be inspired by at least one of the spirits of Marx or Marxism (Derrida 1994, 107).

It is without party, community, union, or organization. Ultimately, in his framing it is the academic engaged in a persistent critique of capitalism: what he calls a "counter-conjuration." Again Eagleton and Ahmed protest. Eagleton calls it the ultimate post-structuralist fantasy: "a perpetual excited openness to the Messiah who had better not let us down by doing anything as determinate as [actually] coming" (Eagleton 2008, 87).

In many ways Derrida's call for an International of scholars engaged in constant critique has come about, but this in itself represent perhaps the largest component of what is today described as the crisis of the university and particularly of the humanities. Wendy Brown (2013), Jill Scott (2013), Chrystia Freeland (2012), Chris Hedges (2011), Martha Nussbaum (2010) and Gayatri Spivak (2012b, 2003, 1993) have all written on this topic. Hedges states that

the university as a liberal institution colluded with the power elite and has thus discredited itself, while Freeland traces the think tanks and elite interests that came together to shift the ideological terrain of post-secondary education after the turbulent 1960's, and Spivak brings up the point that since the 1960's academics withdrew from the larger issues of the outside world and were instead preoccupied with their own struggles within the universities themselves: fighting for social justice curricula, feminism, and anti-racist work. All of the scholars agree that the "trivialization of the humanities" is a deliberate feature of neoliberalist counter-revolutionary attack; and that an uneducated population — or rather a population not educated in history and social justice (what Spivak calls the "hanging out in the space of the other" that humanities education, and particularly comparative literature, fulfills) — is easily marshalled from point a to point b by elite interests. Humanities education is thus essential to a healthy democracy. Spivak states that without a populace trained in the "habits of democracy:"

Metaphors can then be negotiated as literal truth. Any attempt of the state to serve the citizen can be misrepresented as a design on the part of the state to control. Every attempt to save the nation-state economy so that there can be socially just redistribution can be described as state-control of private lives. All efforts by the state to serve business and not people, giving everything over to make capital flow in the interest of the financialization of the globe, can be called "free" enterprise... The citizen cannot afford to be taken in by the old slogans: job creation, small is beautiful, freedom from state control, economic growth, heritage (Spivak 2012c, 8).

And Wendy Brown frames the problem as such:

As neoliberal rationalities reduce the meaning of freedom and autonomy to unimpeded market behavior, and reduce the meaning of citizenship to mere enfranchisement [casting the vote in an increasingly empty ritual], this evisceration of robust norms of democracy is accompanied by unprecedented challenges to democratization. These challenges include: complex forms and novel concentrations of economic and political power; sophisticated marketing and theatricality in politics; corporately owned media and an historically unparalleled glut of information and opinion which all produce an illusion of knowledge; the dramatic thinning out of key democratic values coupled with the intensification of

non-democratic forces and conditions threatens us today with the replacement of self-rule with a condition in which people are mostly pawns, rather than governors of every kind of modern power. And at that point we have demotic power, people power, that is technically legitimate, but dangerous in its ignorance and manipulability (Brown 2013).

Despite this call for an International of a politically disengaged academic circle (without union, party, community, or organization), this work of Derrida is still relevant in that *Spectres of Marx* shows the importance of what the defeat of international socialism means for the construction of the much needed alternatives today. For instance, returning to his critique of Fukuyama, Derrida states:

For it must be cried out, at a time when some have the audacity to neo-evangelize in the name of the ideal of a liberal democracy that has finally realized itself as the ideal of human history: never have violence, inequality, exclusion, famine, and thus economic oppression affected as many human beings in the history of earth and humanity. Instead of singing the advent of the ideal of liberal democracy and of the capitalist market in the euphoria of the end of history, instead of celebrating the 'end of ideologies' and the end of the great emancipatory discourses, let us never neglect this obvious macroscopic fact, made up of innumerable singular sites of suffering: no degree of progress allows one to ignore that never before, in absolute figures, never have so many men, women, and children been subjugated, starved, or exterminated on the earth (Derrida 1994, 106).

Originally, Marxist academics in the West welcomed the collapse of the Soviet Union, because its existence made their work of reforming socialist practices harder; adversaries could always point to the "Stalinist monstrosity" to discredit any call for a socialist political or economic proposal. Derrida echoes the hope that the fall of "really existing communism" will bring about a reformed socialism, but realizes that what has happened after the fall of the Berlin Wall was a type of performative speech act. By constantly declaring socialism and the ideas of Karl Marx dead, ruling interests can continuously delegitimize any criticism of capitalist development. Hence the title *Spectres of Marx* is meant to provoke a realization that as long as

there is injustice in the world there will always be a ghost of Marx haunting the system. Where in the Communist Manifesto Marx opens with the line "there is a spectre of communism haunting Europe today," today it is the spectres of Marx and the paranoia on behalf of the world's elite that the ghost will take shape again in a different form and perhaps institute a new International to challenge their power. Derrida says:

A still worried sigh of relief: let us make sure that in the future it does not come back! At bottom, the specter is the future, it is always to come, it presents itself only as that which could come or come back; in the future, said the powers of old Europe in the last century, it must not incarnate itself, either publicly or in secret. In the future, we hear everywhere today, it must not re-incarnate itself; it must not be allowed to come back since it is past... In the *Manifesto*, the alliance of worried conspirators assembles, more or less secretly, a nobility and a clergy — in the old castle of Europe, for an unbelievable expedition against what will have been haunting the night of these masters. At twilight, before or after a night of bad dreams, at the presumed end of history, it is a 'holy hunt against this specter': 'all the powers of old Europe have joined into a holy hunt against this specter' (Derrida 1994, 48-49).

Derrida points out a dynamic that is a major focus of this thesis: the fear of the specter rematerializing itself in new unrecognizable forms. Namely, in the form of religious social justice movements. This is perhaps one reason we hear a reactionary backlash in America against Pope Francis: a fear that the Cold War "holy alliance" is broken down and that the Church, under the new leadership of a Latin American pope, is signalling the new emergence of a challenge to global capitalism. We also see this constant anxiety over the return of Marx and socialism levelled against the environmental movements; environmentalists are derisively called "watermelons": green on the outside, red on the inside.²¹ So the attacks continue and the

²¹ Harvard historian of science Naomi Oreskes in her work *Merchants of Doubt* (2010) (now a feature length documentary) reviews the trajectory of the climate denial movement and traces it to three main scientists who made their careers in the heyday of the Cold War missile defense programs (Star Wars). Hardcore market ideologues who saw all state regulation as a form of "creeping communism", these scientists after the Cold War started the George C. Marshal Institute and worked in three other areas: industry funded propaganda counteracting the science about

constant need to declare socialism dead reveals the continuous fears of capitalist global interests. Religious social justice is one target of this fear. The British Ministry of Defence has already named religious social justice movements a potential threat: "Inequality may also lead to the resurgence of not only anti-capitalist ideologies, *possibly* linked to religious, anarchist, or nihilist movements, but also to populism and even Marxism" (*Strategic Trends Program: Global Strategic Trends — out to 2040*, 4th edition, British Ministry of Defence, 2010. p.22). The capitalist world's fear of what Fidel Castro termed a "strategic alliance" between socialism and Christianity (Sigmund 1990, 163), which was most famously embodied in liberation theology, still presents an attractive and popular force.

In the next section of the thesis I tackle the history of Catholic social thought. By attempting to position itself between capitalism and socialism — against both the injustices of unimpeded markets, wealth accumulation, and unfair development as well as the dictatorship and official atheism of communism — the Church has developed a tradition of social and economic thought. By analyzing the trajectory of this tradition I highlight the interplay of American liberalism on the Church. Although the tradition always claimed a balance, or rather, a distance between both capitalism and socialism, this balance was shifted in favor of the liberalism of the American hegemon in the papacy of John Paul II. This is clearly shown in the ideological shift documented in the encyclical tradition. This acquiescence to American liberalism is evident in a number of areas that the literature on modern Catholic social thought outlines. I then turn the focus to the place of religion and the Church in globalization, stressing its role in post-Cold War

the harmful effects of tobacco use for the R.J Reynolds corporation, defending PCB's and discrediting their linkage to the hole in the ozone, and also attempting to delink the role of chemicals in the production of acid rain. The reason why they have been successful in the climate denial movement while failing on all these other fronts is due mostly to the huge funds that the oil and gas sector have contributed to the project and also the forces at stake: as global energy markets, like finance, are the life blood of modern global capitalism. The ideological stakes are higher in the energy market... literally, the power of the system.

world governance models which highlight the importance of civil society for maintaining and building democracy. A specter of justice still haunts the Catholic social tradition. By outlining the development and the resource of social Catholicism, and the political space religion is accorded in American liberal models of governance (now hegemonic and global), I aim to examine the possibilities for change that the Church can have on the world-system.

Part III: The Relationship of Liberalism and Catholic Social Thought: Reactionary Conservative, Progressive, and Postmodern Conservative

5. Nineteenth and Early Twentieth Century Anti-Liberal Catholicism: Nostalgia and the Social Question

The Church's uneasy relationship to capitalism and its liberal ideology goes back to at least the French Revolution and its support for the *ancien régime*. As I mentioned in the previous chapter, the Church, as a conservative institution, sought to prop up traditional monarchy and supported the Holy Alliance of Klemens Metternich. Catholicism in the nineteenth century was characterized by its reactionary stance against liberalism, both political liberalism (representative democracy and individual freedoms) and economic liberalism (capitalism and the right of private property). Also, with the explosion of organized socialist uprising and labor unrest in the latter half of the nineteenth century, the hierarchy began to formulate its first positions against socialism. It is not until after World War II that the Church began to change its positions to support representative political democracy and liberal human rights. At the present moment, the Church is renowned as one of the strongest global institutions in advancing the global recognition of the liberal values of democracy and human rights, but its stance against socialism, which characterized its work throughout most of the twentieth century, mirrored its nineteenth century recalcitrance against liberalism.

In this part I outline the Church's relationship to liberalism as the world-system moves from British to American hegemony, from a European anti-clerical liberalism to an American model of liberalism which is more favorable to the rights of religious institutions. In this chapter I categorize three time periods, each corresponding (roughly) to the shifting relationship to liberalism. In the evolution and development of Catholic social thought certain concepts have emerged which have become the hallmarks of the tradition. These include the common good,

solidarity, subsidiarity, the preferential option for the poor, the dual focus in Catholic social thought of human rights alongside duties and responsibilities, and Catholicism's unique theorization of the right of private property (what John Paul II calls the "social mortgage" on private property). Throughout my treatment of these three time periods I highlight the evolution of these concepts in the tradition.

I am using the terms conservative and progressive with qualifying adjectives to highlight the political flavour of these periods. Obviously the reality is much more complicated. As I mentioned in the introduction, Catholic social thought is formed through the convergence of various ideas flowing out of numerous theological schools alongside the influence and pressure of Catholic social movements. As Marvin Mitch has shown in his book *Catholic Social Teaching and Movements* (1998), these associational groups are just as important in their influence as the scholarship coming out of the schools. Two examples of the importance of these movements are the influence of the Catholic Knights of Labour in North America as a catalyst to the position on labour taken in Leo XIII's *Rerum novarum* (1891),¹ and the Focolare movement on Benedict XVI's *Caritas in veritate* (2009).

Instead of using terms such as conservative, progressive, or socialist, it might be better to use Michael Schuck's (2005) classification of traditionalism, cosmopolitanism, and transformationism. The concept of subsidiarity, for instance, emerges from the cosmopolitanism of William Emmanuel von Ketteler and develops throughout the tradition, eventually finding its

¹ Gordon C Zahn outlines the controversy surrounding the Knights of Labour: "The Knight, probably the first successful forerunner of modern unionism (it already claimed a membership of a half-million!) had been formally condemned by a Canadian bishop as a forbidden secret society, and some of the more prominent prelates of Canada and the United States took the issue to Rome in an attempt to have the condemnation validated and extended by the Holy See. Their efforts failed thanks to the equally determined efforts on the part of Cardinal Gibbons and Bishop Ireland on the Knight's behalf" (Zahn 1991, 46). Thirty years later Gibbons would recall that the central issue was that "If the knights of Labor were not condemned by the Church, then the Church ran the risk of combining against herself every element of wealth and power... But if the Church did not protect the working man she would have been false to her whole history; and this the Church can never be" (Gibbons quoted in Zahn 1991, 46).

way into the European Union's Maastricht Treaty (1996), while the corporatism in *Quadragesimo anno* (1931) finds its roots in the late nineteenth century traditionalism of René de la Tour du Pin and Karl von Vogelsand (Schuck 2005, 112 and 115). Transformationism, on the other hand, is exemplified by the radical utopianism of Catholic groups that build structures of justice and seek the Kingdom of Heaven now. These communities of profound moral weight influence the papal encyclical tradition by their popularity and action. My classificatory schema derives from the desire to simplify each period into digestible segments; various forces and ideas (traditional, cosmopolitan, and transformative) are swirling around in all these eras, yet some forces are more prominent in the hierarchical teaching at different times. For example, corporatism as a "third way" between socialism and liberalism is a major element in Pius XI's *Quadragesimo anno*. The concept helps align Catholic social thought in the reactionary period with fascist and authoritarian political thought. It is highly paternalistic and characterizes the siege mentality of a "fortress Catholicism." Furthermore, Schuck's classification delineates trends within the tradition, while this thesis uses the political demarcations to highlight the Church's response to the liberalism of the world outside Catholicism.

Catholic social thought is much wider than the social encyclical tradition. Indeed, many scholars distinguish between Catholic social thought (movements and theologies) and Catholic social teaching (the official documents from the Second Vatican Council and the papal magisterium). But what makes the social encyclical tradition so appealing to this work is that each encyclical establishes "benchmarks" in the development of social Catholicism. This makes for a convenient genealogy. Although Catholic social thought goes further back than *Rerum novarum* (most would say it goes back to the biblical experience of the Hebrew peoples in Egypt), Leo XIII's encyclical, and the moments immediately preceding it, are a good place to

start. The majority of the encyclicals identified with the teaching are published to commemorate the anniversaries of *Rerum novarum*, as this is the first papal response to "the social question."

5.1. The Social Question and the Birth of Modern Catholic Social Teaching: Three Time Periods and Three Responses

Modern Catholic social thought was birthed in the context of the absolute immiseration witnessed in the industrial revolution in the Western world in the late nineteenth century. The conditions of squalor that people were forced into as a result of the rapid urbanization which industrial capitalism produced led to new social arrangements and political mobilizations. The Church originally responded to this "social question" by advocating a return to past forms of medieval life, and sought to lessen the rapacious greediness of the emerging capitalist class while quelling the revolutionary drive of the working classes. Indeed, the major characteristic of the entire corpus of the encyclical tradition of social Catholicism is the idea that the different classes can get along and come together to solve the social question in its various historical manifestations. The encyclicals sound radical when read, especially by today's standards. However, the solutions proposed are most often reformist and usually involve advocating a change of heart, a reform of morals, or cooperation in "solidarity" for the "common good."

In the first period I examine, 1891 until after World War II, this takes a paternalistic form, seeing the laity and workers as little children that need leadership, guidance, and love from not only the Church but also the owners of capital. In the second period, centered around the Second Vatican Council, the Church's response to the social question takes a more progressive form, frequently calling on the responsibility of public authorities to remedy injustice. In the third period I examine, the papacies of John Paul II (1978-2005) and Benedict XVI (2005-2013), the response takes what I am arguing is a postmodern conservative form, rearranging progressive

language for conservative purposes. The progressive moment of Catholic social teaching is buttressed by two conservative eras, the first sought (and failed) to conserve and reinstate medieval and feudal structures against liberalism and modernity, while the second acquiesces to liberalism and moulds the transnational character of the Church into an important global institution for liberalism's worldwide proliferation. I outline how, in a certain way, this second conservative moment seeks to conserve American liberal hegemony.

We should not see this second conservative era as necessarily negative, however. Indeed, the Church's shift to liberalism, the advocacy for democracy and human rights, has been one of the most important historical developments in the last century, and the importance that the Church played in the "third wave of democratization" should not be diminished. Yet, as I have highlighted throughout this thesis so far, the American liberal model itself has birthed its own problems and the Church's conservative defense of this model has led to both external conflicts with society and internal conflicts within the Church.

5.2. Reactionary Conservatism: Against Liberalism and Socialism

Peter Steinfels (1994) outlines the nineteenth-century conflict between the Church and liberalism, specifically in the papal encounter with the emerging groups of "liberal Catholics." Gregory XVI (1831-1846) condemns Félicité de Lamennais and his followers with the encyclicals *Mirari vos* (1832) and *Singulari nos* (1834); while later on, and most famously, Pius IX's condemns liberalism in *Quanta cura* and the Syllabus of Errors, both published in 1864. Steinfels summarizes a number of historical interpretations to the Church's condemnation in the context of the conflict with liberalism and the challenge posed by liberal Catholics. First is what he terms the "melodramatic" interpretation where liberals fight against "obscurantists" and "fanatics" (but of course the roles can be reversed depending on one's point of view: brave

conservatives defending against liberal encroachment). The second is a more nuanced reading offered by E.E.Y. Hales, which sees the conflict as unavoidable, since liberalism seemed set on using its acquired state power to enforce its anti-clerical agenda. Yet even if there was no set "agenda," the experience of the Enlightenment and French Revolutions necessarily leads to the establishment of a "fortress Catholicism," a counter-culture which allowed the Church to survive a difficult century and offer "its healing message to the chastened age that has followed" (Steinfels 1994, 22). And third is a Marxist interpretation (though used by many others favourable to the tradition of social Catholicism) which sees the conflict as a refusal of the Church to bless the legitimating ideology of the newly emerging bourgeois class.

Like liberation theologians a century later, liberal Catholic theologians were able to maneuver these condemnations through interpretative gymnastics. Furthermore, as I mentioned in the last chapter, and as Steinfels also highlights, the liberal political program itself was "consciously anti-revolutionary" except in the context of national liberation struggles (Steinfels 1994, 25). Liberalism itself did not necessarily endorse the liberties that have become synonymous with it — such as freedom of speech, the press, and assembly. The Church was also against these freedoms. The possibility of a positive encounter with liberalism in the nineteenth century was foreclosed by the Syllabus of Errors and the Italian Nationalist's seizure of the Papal States, which led to the reactionary First Vatican Council's declaration of papal infallibility in *Pastor aeternus* (1870) (Schuck 2005, 111). The liberalism that emerged in the last third of the nineteenth century cemented the anti-liberal tradition within Catholicism and led to the future alliances with the authoritarianisms of the first half of the twentieth century. I will treat the turn to liberalism in the next chapter, but it should be mentioned briefly now; the Catholic liberalism condemned in the nineteenth century triumphs at Vatican II.

5.2.1. Nostalgia for the Medieval: Reactions to Liberals and Socialists

Although liberalism, like religion, is notoriously difficult to define, the privatization of religion is the one commonly associated aspect of liberalism that the Church condemned from the nineteenth century to the Second Vatican Council. Joseph Komonchak (1994) notes that although the Church founded and supported a number of associational Catholic organizations to immunize the Catholic faithful from the threat of liberalism, the Vatican did not mind appropriating some of the benefits of liberalism's political structures. The Code of Canon Law (which replaced the body of traditional case law), new ways of centralizing authority in Rome (on the bureaucratic model of the nation-state), and the First Vatican Council's definition of the universal primacy of the pope (based on modern models of sovereignty) all show that while the Church saw the rise of the liberal nation-state in terms of a continuation of "the fall" (the rights of man replace the lordship of Christ), it nonetheless appropriated some of the benefits that would support the hierarchical Church in the modern period (Komonchak 1994, 77-78).

Although the Marxist interpretation of the Church's conflict with liberalism sounds like a legitimate starting point for a treatment on the Catholic response to the social question, it is incomplete. The Church was much more concerned with the loss of its medieval hegemony. For a century and a half it fought mostly against not economic liberalism, but philosophical rationalism, theological emanationism, political liberalism, indifferentism,² materialism, Marxism, and laicism. The first drafts of the texts of Vatican II show this; in the early 1960s the Curia was still preoccupied with undoing modernity, evil in its eyes, and sought to buffer the faithful with reactionary social organizations and politicized piety. The fortress Catholicism and

² Indifferentism was the nineteenth century equivalent of what we today call relativism. Leslie Griffin explains: "Indifferentism was the belief that all religions are equal, that is, indifference to the truth that Catholicism is the one true religion" (Griffin 2005, 245). Like relativism in the reigns of John Paul II and Benedict XVI, indifferentism was a charge leveled against those who disagreed with the hierarchy, and not just on matters of non-Catholic Christians.

counter-cultural siege mentality was a result of the collapse of the medieval synthesis of Church and culture, but also throne and altar. While the educated new liberal middle classes rejected religion for a scientific rational world-view, the working classes were falling sway to atheistic socialism. The Church at the end of the nineteenth century was marginalized and losing its appeal for the vast majority of the European population. Furthermore, Pius IX (1846-1878) was shut up in Rome and declared himself "prisoner of the Vatican," where he remained till his death.

In regard to liberalism David J. O'Brien writes: "[l]iberals throughout the century had regarded the church as a major enemy; when in power, they almost always sought to eliminate its privileges and marginalize its role in public life" (1991, 14). Yet as Richard T. De George notes in the relationship to socialism and Catholicism:

Both sides knew who the enemy was and acted accordingly... It could not coexist with the emerging socialism which saw the church as an opponent whose world-view socialism sought to replace. By way of contrast, capitalism posed no threat to the teachings of the church and sought neither to supplant it nor to attack overtly its doctrines (1993, 129).

Although political liberalism sought to privatize the church, economic liberalism posed no ideological threat. But in its fight with political liberalism, O'Brien notes, the Church sought out allies in those hurt by industrialization: the increasingly insecure peasantry, lower middle classes, and the new proletarian working classes. It sought to lessen the appeal of socialism by demonstrating how the Church also "rejected the inhumanity and brutality of industrial capitalism and an individualism that had destroyed guilds and churches alike and left the powerful free to exert their will" (O'Brien 1991, 16). Most scholars like to see the Church's social tradition as an even-handed critique of both liberal capitalism and socialist collectivism, but De George holds that "Marxism forced the church to engage in the moral evaluations of economic systems... Marxism has been the chief target as well as the driving force behind these

encyclicals" (De George 1993, 127-128). A strange, seemingly contradictory dynamic emerges that characterizes the corpus of Catholic social teaching; in its fight against socialism, the Church reiterates the most powerful Marxist critiques of capitalism, although the prescriptive solutions are of course very different.

In the pre-Vatican II social encyclicals the nostalgia for the medieval synthesis is apparent. Charles Curran elaborates:

Catholic fascination with the Middle Ages continued well into the twentieth century and often was regarded as existing in opposition to the inequalities and injustices of the modern world... Kings and rulers recognized their obligation to God and to natural law. They served as defenders of the poor, the downtrodden, widows, and orphans. Social solidarity, as illustrated in the guild system, marked the economic organization of society... Yes, such a society was hierarchical, static, and heavily agrarian, but in the eyes of many Catholics this was the Christian ideal (Curran 2002, 6).³

This hierarchical ideal was manifest in the paternalistic way the popes saw their authority. Richard Gaillardetz takes Pius X's encyclical *Vehementor nos* (1906) as emblematic: "[It] follows that the Church is essentially an unequal society... the one duty of the multitude is to allow themselves to be led, and, like a docile flock, to follow the Pastors" (*Vehementor nos* quoted in Gaillardetz 2005, 81). This paternalist pastoral metaphor runs throughout this period, particularly in the long pontificate of Pius IX. Leo XIII (1878-1903) changes this metaphor and made neoscholasticism the approach to Catholic philosophy and theology in his encyclical *Aeterni patris* (1879). Under this paradigm the metaphor shifts to one of "cosmological design" "in which it is the task of the Church to see that the natural order of things, indeed all of creation, fulfills its God-given end" (Gaillardetz 2005, 73). Although with Leo XIII a brief space is opened for the Church's positive engagement with the modern world, Pius X (1903-1914) reverts

³ David Matzko McCarthy notes that in the medieval period "one third of the year is taken up with holiday leisure, and laborers worked about fifty percent less than their counterparts in nineteenth-century industry" (McCarthy 2009, 133).

to a strict siege mentality which lasts until the pontificate of Pius XII (1939-1958). According to J. Bryan Hehir: "On church and state Leo XIII prepared for change; he did not effect change on specific issues. But Pius XII did" (2005, 30). And as John Anderson notes, "Though Leo XIII shifted the papal position on social issues, there is little evidence to suggest that he favoured any fundamental shifts on matters of liberalism, democracy or freedom of conscience" (Anderson 2009, 36)

5.2.2. *Rerum Novarum* (On the Condition of Labour) (1891) and the Social Question

Leo XIII's social encyclical, often referred to as the Church's *magna carta* on labour, began the long tradition of Catholic support for labour unions (Higgins 1993). It also developed the theological justification for the right of private property in Catholic social teaching, and delineated the role of the state or public authority in sustaining the social order, which will later be more fully developed into the principle of subsidiarity.

The development of the support for labour unions was a complex convergence of the corporatist desire to rebuild in the modern world the system of medieval guilds (patrimonial and whose membership consisted of workers lead by bosses and owners) and the Catholic labour movement's call for independent workingmen's associations. The corporatist model was advanced by Matteo Liberatore (1810-1892), who wrote the first draft in Italian. The trade union model was brought in by Bishop von Ketteler of Germany, as was the more developed change about the role of the state in resolving social issues.⁴ Section 36 of *Rerum novarum* reads: "It is gratifying to know that there are actually in existence not a few societies of this nature,

⁴ Gordon C. Zahn also notes Ketteler's "pivotal role" to the development of Bismarck's social welfare state (Zahn 1991, 49).

consisting either of workmen alone, or of workmen and employers together; but it were greatly to be desired that they should multiply and become more effective" (*Rerum novarum*, n.36).

In this passage we have the affirmation of the trade union model. Thomas A. Shannon states its impact for the future development of social teaching:

This support, while not necessarily implying a rejection of corporatist principles or the model of vocational groups to help solve problems in particular industries, did contribute, after many years, to the decline of the corporatist movement and its emphasis that workers should be under the protection and guidance of management and to the development of a strong labor movement under the direction of workers themselves (Shannon 2005, 146).

Shannon cites Paul Misner who notes that Liberatore's influence in the encyclical can also be seen in the acceptance of private property and usury, which amounts to a partial acceptance of liberal economics, despite Ketteler's rejection of liberalism's elevation of private property to an absolute right (Shannon 2005, 132 and 134). Most scholars agree that *Rerum novarum*'s elevation of the "right" to private property on Thomistic grounds is simply wrong (Curran 2002, 175; Shannon 2005, 142). Aquinas saw the necessity of private property not as part of human nature but on the basis of human existence in this sinful world: "Aquinas was very cognizant of the teaching of the early church that understood this specific notion of private property to be based primarily on human sinfulness, not on human nature as such" (Curran 2002, 176). The work of Jesuit Luigi Taparelli helped bridge the gap between John Locke's theory of property and Thomistic natural law. Taparelli (1793-1862) and Liberatore were the key developers of Thomistic neoscholasticism and developed the theory of private property in Catholic social thought (Schuck 2005, 112; Shannon 2005, 142).⁵

⁵ The concepts of social justice and subsidiarity are also attributed to Taparelli, though they don't officially enter the encyclical tradition till much later.

John Coleman sees the drafters of *Rerum novarum* as capitalist reformers; absolutely against liberal economic *laissez faire*, they nonetheless find themselves preoccupied with the threat of socialism (Coleman 1991b, 32). In this light, the endorsement of Catholic participation in labour unions should be read as a way of deflating the appeal of socialism in the labour movement.

De George claims that you can read *Rerum novarum* as a point by point refutation of the Communist Manifesto (1993, 130-134). (1) Marx seeks the abolition of private property. Leo says that if the state would seize private property the first to suffer would be the common man. However, the pope's (at best) conservative solution is that the common man should tighten his belt and invest in land. (2) Marx and Engels attack the bourgeois family and marriage, while the pope defends marriage as the prime unit of society against the individualism of liberalism. (3) Although the equality of all before God is a timeless Christian ideal, the pope states that equality would lead to a leveling down which would infuse envy and discord. (4) Marx seeks to end oppression, while the pope states that "to suffer and to endure... is the lot of humanity." (5) Although advocating for private property, the encyclical nonetheless attacks the importance capitalism places on wealth and hence undercuts the motives of greed and envy Marx plays up. (6) The history of class conflict is the basis of all history to Marx, while to Leo classes are ordained by God as the body politic and requires different parts to function. (7) Both agree on the evils of capitalism such as exploitation, the degradation of human beings in urban slums and squalor, child labour, fraud, and injustices in working contracts. But while Marx advocates expropriation and the abolition of private property, the pope preaches the role of the state to secure economic justice (particularly distributive justice) and sees the role of the state to ensure public well-being and private prosperity (Shannon 2005, 137). (8) Marx seeks a political

revolution; the pope seeks to infuse morality in the individual. Coleman names this as the "bias towards the social rather than the political revolution" that becomes a semi-consistent characteristic of Catholic social teaching (Coleman 1991b, 33). (8) Marx saw all wages as necessarily exploitative, while Leo formulates the Catholic principle of the just wage for the first time in an encyclical. "For Marx a just wage is a contradiction in terms" (De George 1993, 133). Again, in order to refute the attraction of socialist solutions, Leo XIII ends up agreeing with the diagnosis of capitalism made by the socialists of the time, yet rearranges them towards paternalistic and conservative ends. Hence the documents sound subversive when read today. The same strategy is used by Joseph Ratzinger in his two condemnations of liberation theology in the 1980's, agreeing with the problems that the movement is responding to, yet condemning the proposed solutions.

Like world-systems analysis, Catholic social thought sees the family as the prime unit of social analysis. It is difficult to speak of the proletariat as a class, but world-systems analysts do speak of proletarianized households. Christine Firer Hinze elaborates almost word for word what the world-systems analysts say about the proletarianization of households:

In premodern economies all family members contributed toward household maintenance; today families are nearly wholly dependent on wages for their material survival. Further, in a wage-based economy, women's and children's economic contributions, traditionally unpaid and made within and around the domestic household, are removed from the productive equation. To respond by making women and children into wage earners, is, however, soundly rejected by both Pius [XI] and Leo, who insist that 'it is wrong to abuse the tender years of children or the weakness of women (Firer Hinze 2005, 159).

To Leo XIII the just wage and adequate time off for the father will secure family stability against the ravages of industrial capitalism that forces women and children into squalid working conditions in which they are prey to sexual harassment and abuse. Although this reading is

based on an essentialized notion of women's nature, Shannon observes that it is important that the pope recognized the social problems that women and children were facing in the industrial workforce at the turn of the century (Shannon 2005, 138).

The just wage also allows the worker to engage in property ownership. This would lessen the attraction of socialism to the working classes, ensure that the right of property is secured even though the state should have some rights to subject that ownership to the criterion of the public order, and will bring the two classes together:

On the one side there is the party which holds the power because it holds the wealth; which has in its grasp all labor and all trade; which manipulates for its own benefit and its own purposes all the sources of supply; and which is powerfully represented in the councils of the State itself. On the other side there is the needy and powerless multitude, sore and suffering, always ready for disturbance (*Rerum novarum* n.35).

Leo's encyclical brings into the tradition the ideas of the just wage, the right of private property, the role of the state to intervene for the public interest — later formulated as "the common good" in *Quadragesimo anno*, becoming a hallmark of Catholic social thought in the papacies of John XXIII and Paul VI — and one can trace in the encyclical the precursors to the principle of subsidiarity, rights coupled with responsibilities, and even the preferential option for the poor. Leo also lashes out against the injustice of employment contracts (which I mentioned in the last part) that in his day were characterized by asymmetric power relations; desperate labourers would accept low compensation from their ruthless employers: "viewed as supporting the laborer and his family, the laborer is not free to accept just any wage, and the employer is morally prohibited from pressuring the acceptance of low wages based on the worker's need" (Donovan 2009, 63). However, the paternalist anti-democratic tone, semi-corporatist influence, and fairly conservative solutions (a change of hearts not a change of structures) were elements

that needed to be cleared out of the tradition before Catholic social thought could be heard as a legitimate voice in civil society. O'Brien says three things should be remembered about *Rerum novarum*. (1) As I mentioned before, it is reformist, not radical. (2) It is a product of the ultramontane church; the priests not the laity are to be the leaders of these Catholic social and labour movements and the movements should be under strict hierarchical supervision. (3) It was Leo's attempt to ground Thomistic neoscholasticism as the new Catholic rationalist paradigm to secure the middle ground between what was perceived to be the two extremes of the age (O'Brien 1991, 17 and 18). Furthermore, its corporatist agenda was hidden for strategic purposes in an era of triumphant liberalism and capitalism. This corporatist agenda comes out in *Quadragesimo anno*.

5.2.3. *Quadragesimo Anno* (After Forty Years) (1931), Corporatism, and Subsidiarity

The context in 1931 was markedly different from that of Leo XIII. Liberalism was in an extreme crisis. In his reminder to be cautious of triumphalist liberalism in the 1990's (what world-systems analysts refer to as the second *La Belle Époque*), R. Bruce Douglass reminds us that liberalism in the past had periods of unquestioned success and dismal failure: "We too easily forget how widespread was the disaffection with liberal thinking in the inter-war period" (Douglass 1994, 103). The aftermath of World War I and the Market Crash of 1929 seriously shocked the legitimacy of the "vital center." This period of systemic chaos of shifting hegemonic power (according to world-systems analysis) was characterized by the ideological discrediting of European liberalism. "While it is too simple to say that liberal Europe died in the trenches of World War I, or at Versailles, or with the Bolshevik revolution, these events did dramatically change the European political, social, and cultural landscape" (O'Brien 1991, 18).

Pius XI saw a chance for the Church to regain some of its former glory in the vacuum left at this time. *Quadragesimo anno* is his attempt to outline a corporatist Christian social order. Jesuit Oswald von Nell-Breuning wrote the text except for n. 91-97, which were written-in after by Pius's own hand and are the most controversial parts of the encyclical because of their endorsement of the Fascist system of syndicalist corporatism. Firer Hinze notes that although "Nell-Breuning tended to blame himself, this twist in reception [most responses to the encyclical saw it as reactionary, statist, and restorative] was more likely an unavoidable result of what Paul Misner calls 'the Fascist shipwreck' in which QA [*Quadragesimo anno*] was, willy-nilly, involved" (Firer Hinze 2005, 162).

The problem with these corporative associations, as Shannon points out, is that they rarely ever articulated worker's actual concerns, workers rarely ever rose to leadership, the organizations were paternalistic, and in their original form they explicitly committed "to the restoration of the Monarchy" (Shannon 2005, 131). Under Fascism, "[t]hese 'corporations,' composed of representatives of workers and employers in a trade, act as 'organs of the state' and coordinate union activities in all matters. Strikes and lockouts are forbidden; when contending parties fail to agree, public authority intervenes" (Firer Hinze 2005, 162).

Although Pius XI did criticize (not technically condemn) Fascism in *Non abbiamo bisogno* (1931) and Nazism in *Mit brennender sorge* (1937), his main concern in these encyclicals was in the regimes' interference with the Church, Catholic education, and Mussolini's closing of Catholic Action and Catholic Youth organizations (Sigmund 1994, 225).⁶ It is not until Pius XII (1939-1958) in his 1945 Christmas address, that the Church condemns

⁶ Pius XII was concerned especially about communism and the state expropriation of property, but also "the arbitrary confiscations and the comprehensive mobilization of resources carried out by the Nazis, the fascists, and assorted political thugs who did not reject property rights as such but who were intent on total social control and political enrichment" (Langan 2005, 176).

totalitarianism; and then, only after the Allies' defeat of Nazism and Fascism, leaving only communism to bear the condemnation (Langan 2005, 183).

Quadragesimo anno is remembered for its triumphalist tone,⁷ its condemnation of Christian socialism (they are "contradictory terms" n.120), and for its introduction into Catholic social teaching of the terms social justice, subsidiarity, and the common good. Liberalism and socialism are both criticized, but since Pius cannot separate the atheism from socialism, it is condemned wholeheartedly, while the possibility of a reformed liberalism is kept open to the social tradition but requires a change of heart and a reform towards Christian values. O'Brien reminds us that the encyclical is radical and reconstructionist, not reformist (O'Brien 1991, 19). But, after *Quadragesimo anno* the corporatist reconstruction is abandoned, and subsequent popes are clear in their social encyclicals that Catholic social thought in no way represents an independent "third way" (Curran 2002, 198). De George notes that since the encyclical predates the New Deal, it was not possible for Pius XI to see a state which secures socialist public services without Marxist atheism. Hence, we have in *Quadragesimo anno* a condemnation of socialism "which foreshadows the views of latter popes on liberation theology" (De George 1993, 135).

Pius XI sees that not only is charity not enough to remedy the present unjust situation but it acts as a type of placeholder for real justice:

⁷ When discussing the greatness of *Rerum novarum* Pius states: "For it boldly attacked and overthrew the idols of liberalism, swept aside inveterate prejudices, and was so far and so unexpectedly ahead of its time, that the slow of heart ridiculed the study of the new social philosophy, and the timid feared to scale its lofty heights" (n.14). Also, "the supreme shepherd [Leo]... boldly took in his own hands 'the cause of the workingmen, whom the times had delivered, isolated and helpless, to the niggardliness of employers and the greed of unrestrained competition.' He sought neither help from liberalism nor socialism" (n. 10). Finally, the section everyone chides "The eyes of all, as often in the past, turned towards the chair of Peter, sacred repository of the fullness of truth whence words of salvation are dispensed to the whole world. To the feet of Christ's vicar on earth were seen to flock, in unprecedented numbers, specialists in social affairs, employers, the very workingmen themselves, begging with one voice that at last a safe road might be pointed to them" (n.7). Leo's marginalized Church was in no way as influential.

This state of things was quite satisfactory to the wealthy, who looked upon it as the consequence of inevitable and natural economic laws, and who, therefore, were content to abandon to charity alone the full care of relieving the unfortunate, as though it were the task of charity to make amends for the open violation of justice, a violation not merely tolerated, but sanctioned at times by legislators (*Quadragesimo anno* n.4).

Social justice is the term used by Pius XI to "describe the situation in which the demands of the common good are honored and met by and for all members" (Fisher Hinze 2005, 158). The common good is the goods in common to each person in that all can share the wealth and economic opportunities in a justly ordered society. This "God-given law" (natural law) is violated in *laissez faire* capitalism where the wealthy hoard the goods of creation to themselves, and in the socialist labour-theory of value where the propertyless demand all for themselves. To define the common good and its duties is the function of the public authority; but structurally, the state should not take upon itself activities that associations can accomplish by themselves. This is the principle of subsidiarity which finds its first articulation in Pius' encyclical:

When we speak of the reform of institutions it is principally the State we have in mind... much that was formerly done by small bodies can nowadays be accomplished only by large organizations. Nevertheless, it is a fundamental principle of social philosophy, fixed and unchangeable, that one should not withdraw from individuals and commit to the community what they can accomplish by their own enterprise and industry. So, too, it is an injustice and at the same time a grave evil and a disturbance of right order to transfer to the larger and higher collectivity functions which can be performed and provided for by lesser and subordinate bodies. Inasmuch as every social activity should, by its very nature, prove a help to members of the body social, it should never destroy or absorb them (78,79).

Subsidiarity develops throughout the tradition to encompass a dual focus or movement.⁸ First, the state should not take upon itself tasks that can be performed at more local levels within the

⁸ Archbishop Rembert G. Weakland reminds us that subsidiarity has no scriptural basis and "even its derivation from natural law remains unclear. It is just stated as a fact or principle by Pope Pius XI" (Weakland 1991, 206).

hierarchy of the state itself (at the different levels of government) or subsume within itself tasks that voluntary associations are performing in their communities. The second movement stresses that if these local and associational structures cannot perform the tasks of fulfilling the needs of people or the common good (due to lack of resources or organization), then the public authority has the responsibility to assume these tasks (but also to implement policies that strengthen civil society and give it back the tasks that were previously subsumed). This second feature of the principle was strengthened by the controversial introduction of the notion of "socialization" in John XXIII's *Mater et magistra* (1961).

To progressives, subsidiarity validates a strong regulating state with public utilities, industries, a robust social safety net; and, if needed to safeguard the common good, justifies nationalization and property expropriation. To conservatives it represents a call not only against socialism, but an altogether dismantling of the welfare state; to them it enshrines in Catholic social teaching their view that "the state that governs least, governs best."

It is with the next two popes, John XXIII and Paul VI, that the principles articulated in the tradition of this period take on new progressive orientations as the Church abandons its past insistence on restoring Christendom, whether through monarchy or corporatism, and begins to articulate its public voice in a liberal world religions framework. I treat this shift in greater detail in the next two chapters and the conclusion, but it is important to note that this "disciplining" of the Church represents an acquiescence to liberalism, which the Church begins to partially advocate, first, in a progressive shift towards openness to the world, then through a conservative defense of post-Cold War American liberal hegemony. The convergence with liberalism and Catholicism is positively remembered as the *rapprochement* and begins with John XXIII.

6. Twentieth Century Progressivism: Between Socialism and Liberalism

Although Pius XII became open to democracy after World War II, he nonetheless condemned John Courtney Murray's work in the 1950's (Langan 2005, 185). Murray's work would later set the foundation for the Second Vatican Council's Declaration on Religious Freedom, *Dignitatis humanae* (1965). Famously, it has been said that John XXIII (1958-1963) would be an interim pope due to his age when elected, yet he surprised everyone by calling an ecumenical council for the purposes of what he called *aggiornamento*, and used the metaphor of opening a window to let a breeze into the Church. *Aggiornamento* and *rapprochement* are the two terms used most often to describe this period, and John XXIII, in calling Vatican II, begins this historic moment. José Casanova states that the *aggiornamento* is what repositions the Catholic Church "from a state-oriented to a civil-society oriented institution" (Casanova 2012, 29). While John Courtney Murray's work helped the Church make a distinction between the state and civil society, the work of Jacques Maritain was also instrumental for the council's theological justifications for engagement with the modern world and the acceptance of the modern state as an ideal situation for Christians in the way that it disengages the Church from material culture (Cavanaugh 2011, 132-133).

Born from a poor rural family, John XXIII in many ways signalled what Antonio Gramsci referred to as the "organic intellectual." Before the Council he published two encyclicals, seen by many as a "one, two punch" to knock the Church out of its past recalcitrant position and set the progressive agenda for a renewal of Catholicism: "So effective was this initiative that it was sustained even after John died" (Garry Wills, quoted by Mich 2005, 193).

John was famous for his opening to the left, advocating the possibility for Catholics to work alongside socialists and "all men of good will" in different actions on behalf of justice, and

for disengaging the Vatican from Italian political affairs, setting the stage for a new conceptualization of the role of Christians in public life.¹ His work at the Council was carried through after his death by Paul VI (1963-1978), who, in terms of Catholic social teaching, took the Church to new levels of democratic decentralization, put an emphasis on social liberation, and furthered the global focus of "the social question" begun by his predecessor. The focus on international development and aid enters into the encyclical tradition at this time, beginning with John XXIII's *Mater et Magistra* (Christianity and Social Progress) (1961), but developed more substantially in Paul VI's *Populorum progressio* (On the Development of Peoples) (1967). Hehir calls this the "second stage" of Catholic social teaching, particularly when Paul VI states in *Populorum progressio* n.3 that the social question has become "worldwide" (Hehir 1993, 31).

The two papacies also represent a shift in Catholic spirituality. This is best developed in Vatican II's *Gaudium et spes* (The Pastoral Constitution on the Church in the Modern World) (1965), which advocates for a spirituality of social engagement in contrast to the older spirituality of detachment from the world. John XXIII brings in the methodology of "see, judge, and act" (especially for the laity and their grassroots work) which sees its fullest expression in Paul VI apostolic exhortation *Octogesima adveniens* (A Call to Action on the Eightieth Anniversary of *Rerum novarum*) (1971). "See, judge, act" later becomes the "the hermeneutic circle" of liberation theology, and "the pastoral circle" of North American theological social analysis (Mich 2012, 11).

6.1. John XXIII, Socialization, and Human Rights

¹ Drew Christiansen tells of a showdown in 1962 over the nationalization of the Italian power company which the Christian Democrats supported in the center-left coalition government of Amintore Fanfani. "[Cardinal Giuseppe] Siri declared that with the nationalization proposal the Christian Democrats had forfeited the right to be called 'Christian.' John, however, accepted the advice of leading moralists, including the Lateran's Monsignor Pietro Pavan, that nationalization could be required by the common good without infringing on basic freedom. In a personally typed note to prominent industrialists, the pope declared his political neutrality" (Christiansen 2005, 218).

Although *Quadragesimo anno* was radical in its critique of capitalism, its staunch condemnation of socialism fomented an anticommunist and antisocialist alliance between the Catholic Church and socially conservative forces. As a result "the Catholic Church was perceived in many countries as defending the status quo rather than calling for structural change that would empower the poor" (Mich 2005, 208). *Mater et magistra* attempted to stop this and began a two decades long process that would align the Church with the principles of the democratic welfare state. During the years of Pius XII a divisive ideological battle about the welfare state was fought in Catholic circles, where some saw it as undermining personal responsibility. John weighs in on this by endorsing a "thick" role for government and introduces the term "socialization" into the teaching.

Put briefly, socialization in *Mater et magistra* refers to the natural human inclination to come together to solve problems, which "definitely brings numerous services and advantages" (n.61) such as healthcare, education, skills training, housing and labour. State intervention in the economy is needed to avoid mass unemployment and facilitate "for every individual the opportunity to engage in productive activity" (n.55). Leo XIII would never have accepted the Marxist notion of socialization, which meant the abolition of private property and the establishment of collective ownership. But Pius XI opened the door to a moderate socialism when he stated: "It is rightly contended that certain forms of property must be reserved to the state, since they carry with them a power too great to be left to private individuals without injury to the community at large" (*Quadragesimo anno* n.114). John XXIII "took Pius XI's minimal openness to future collaboration with moderate socialists and expanded it" (Mich 2005, 206). As long as the principle of subsidiarity is kept, in that associations and voluntary organizations are free to perform their work, and as long as the public authorities pursue the common good, then

socialization can be seen as beneficial. The common good in *Mater et magistra* represents "the sum total of those conditions of social living, whereby men are enabled more fully and readily to achieve their own perfection" (n.65).

Marvin L. Mitch lists seven implications of socialization suggested by the encyclical. (1) Workers are entitled to share in the ownership of the company where they work (n.75). (2) Workers should have a say in determining policy and management (n.92-93, 97). (3) The state should exercise control over managers of large businesses (n.104). (4) State ownership is justified for the common good (n. 116-117). (5) The public authority has taken on a larger role in tackling social problems (n. 120). (6) The state must address the plight of rural peoples and farmers, building the much needed infrastructure to connect rural areas (n. 128-41). And (7): "Specific suggestions are made in regard to tax assessment (133), credit facilities (134), insurance (135), social security (136), price supports (137), price regulations (140), and moving industry into rural areas (141)" (Mich 2005, 208).

John also stopped the political condemnation of social systems by abandoning the nostalgic advocacy for a Christian social order and saw instead, in line with theologian Karl Rahner at the time, the Church's mission as being a companion to humanity's own struggle to build a just world (O'Brien 1991, 23). He also shifts the focus away from the "primary right" of private property by "tying it to social obligation" (De George 1993, 136). Pius XI tempered Leo XIII's validation of the right of private property (Mich 2011, 151-153; Clark 2014, 39 n.40), but John XXIII corrected it back to the original Thomistic tradition. To Aquinas primary rights are those necessary for survival such as food, shelter, and clothing. Private property is a right "to the extent that it serves a social function, in that it helps to promote order in society and the stewardship of resources" (Mich 2005, 200). Lastly, *Mater et magistra* is the first to recognize

the injustice of what later becomes known as globalization. John talks of the social solidarity needed between nations and the duty of wealthier nations to aid poorer ones (n.37), but warns against "imposing their own way of life upon them" (n.170).

In his first two years as pope, John XXIII built a team of close advisors that helped him draft *Mater et magistra* and also *Pacem in terris* (*Peace on Earth*) (1963). These included Cardinal Augustin Bea, whom he appointed to head the newly formed Secretariat for Christian Unity; Pietro Pavan, lecturer in social economics who would also play a role in Paul VI's pontificate; Agostino Ferrari Toniolo, a professor of comparative law; Sante Quadri, of the Catholic Workers' Organization (ACLI); and Luigi Civardi, a leader of Catholic Action. *Pacem in terris* begins the long tradition of Catholic human rights in the social tradition, and is important in the way it links both the traditional liberal human rights of association, speech, and political rights to the socio-economic rights for food, shelter, clothing, and the material security needed for the human to pursue fulfillment. These collective rights are often at odds, David Hollenbach notes, with the way human rights are thought of in the West, that is, on an individualistic understanding of the human person (Hallenbach 2005, 280).

"Rights talk" is not new to Catholicism, as we already saw with Aquinas, but fell into disuse during the reactionary Enlightenment period. The re-emergence of rights language in *Pacem in terris* brings something new to the international discourse of human rights, namely, rights coupled with responsibilities and duties: "if a man becomes conscious of his rights, he must become equally aware of his duties" (*Pacem in terris* n.44). Meghan J. Clark outlines how rights and duties correspond at three different levels in Catholic social teaching: (1) The duty to recognize mutuality and reciprocity: I have to recognize the rights of others if I recognize rights for myself; (2) there is a positive understanding to rights: not just a negative injunction not to

violate the rights of others, but a positive commitment to advocate for other's rights; and (3) a correlative duty to live the right: for example, "the right to life come with a correlative duty to live life to the fullest" (Clark 2014, 16 and 93). *Pacem in terris* also brings in the right to development and develops an early concept of solidarity in its discussion of virtue in international affairs. Solidarity in this case means "recognizing that all political authority exists to fulfill the common good of the whole human family" (Christiansen 2005, 225). *Mater et magistra* mentions solidarity briefly in its treatment of farm workers, but it does not develop into a major principle of the tradition until *Pacem in terris*.

Part Four of *Pacem in terris* supports the United Nations' Universal Declaration of Human Rights, and this begins the long relationship of the Catholic Church with the UN. The encyclical specifically uses the principle of subsidiarity to argue for a global public authority needed to solve the global social problem, and of achieving a universal common good. The talk of a universal common good was also a novel idea in the encyclical. And *Pacem in terris* brings in support for freedom of religion which develops further in the Second Vatican Council's *Dignitatis humanae*.

6.2. Vatican II: *Dignitatis Humanae*, and *Gaudium et spes*

Although John Courtney Murray's work was condemned in the 1950's, it later became the theological basis of Vatican II's Declaration on Religious Freedom: *Dignitatis humanae*. The main argument of Murray is that the separation between Church and state does not mean a separation between Church and society and that non-establishment is not something to be feared; but rather, acting within the realm of civil society, the Church maintains its superior moral voice without its entanglement in politics (Komonchak 1994, 90). It was Jacques Maritain's work on the proper autonomy of Church and state that influenced Murray. Maritain, who also played an

important role in the drafting of the text, held that the autonomy of spheres should be taken up by the Church because it also protects the Church from the state (Griffin 2005, 249).² Although John XXIII's *Pacem in terris* (1963) was the first document to introduce the right to religious freedom (also the first modern Church document to switch to "rights talk"), it is in *Dignitatis humanae* that the theological and philosophical foundations for such a right are articulated, and articulated under the influence of American liberalism, or what Murray called the American "proposition"

because the American bishops and Murray led the fight for DH [*Dignitatis humanae*], it became known as 'the American schema,' or even as 'Murray's schema.' DH shows the influence of the First Amendment of the U.S. Constitution and was 'beyond a doubt, the specific American contribution to the Second Vatican Council' (Griffin 2005, 250).³

A major problem that needed to be dealt with was the freedom of an erroneous conscience. In traditional Catholic understanding from the nineteenth century "error has no rights," and the paternalistic state was the authority that denied freedom of speech to protect the public from erroneous belief. Pavan and Murray solved this problem by basing religious freedom on the objective dignity of the human person, not the subjective freedom of conscience. Thus *Dignitatis humanae* is important not just for religious freedom, but because it is one of the main pieces on what becomes a major principle in Catholic social thought: the dignity of the human person (Hollenbach 2003, 31).

² It is also important to note the role of Pietro Pavan here, as Christiansen reminds us he "had done for Italian Catholics what Jacques Maritain had done in the French- and English-speaking worlds in laying a theological groundwork for acceptance of freedom, democracy, and human rights" (Christiansen 2005, 222).

³ At the end of her piece Leslie Griffin shows that John Courtney Murray and Pietro Pavan hoped that the declaration would lead to freedom of religion within the Church itself, that is, a democratization of Church structures and an end to punitive measures levelled against dissenting theologians. Pavan stated in 1977 that these trends are already evident. Indeed, we can see them in the 1971 Synod of Bishops' *Justitia in mundo*. However, "Today he [Pavan] sounds naive. 1978, Wojtyla took the papal throne, and truth gained the upper hand... Pope John Paul II has championed the freedom of the Church against the state in the juridical and political realms while resisting religious freedom within the Church" (Griffin 2005, 260).

A much larger problem, however, concerned not religious freedom but the development of doctrine; that is, how to justify a clear split between the past condemnation of religious freedom and the move toward its acceptance. Murray did this by way of the theology of Bernard Lonergan, the Canadian theologian who was instrumental in the shift from a classist methodology (timeless "truths" which are always relevant) to historical consciousness (changing historical circumstances change the implementation of these "truths"). Murray stated that Leo XIII relied on transtemporal principles, but although those principles remain valid and transtemporal, their historical application requires change to the circumstances (Curran 2002, 58). The methodological shift to historical consciousness is most prevalent in *Gaudium et spes* with its emphasis on "reading the signs of the times."

With the shift to historical consciousness comes a downplaying of the neoscholastic natural law approach that characterized Catholic thought since the time of Leo XIII. Although it is still used in the moral teachings on sexuality, in the later social encyclical tradition it is almost nonexistent. Curran discusses the pros and cons of the natural law:

John XXIII explicitly recognizes one of the strengths of the natural law methodology — its openness to dialogue with all human beings — when he formally addresses his letter to all people of good will. Natural law, however, fails to highlight the central role of Jesus Christ in Christian morality. The Gospel, Jesus Christ, and grace should play a significant role in the moral life of Christians. The natural law theory in general and the early papal social encyclicals in particular downplay this role (Curran 2002, 29).

With the displacement of natural law a stricter focus on scripture comes into play, and with it the political message of liberation, the gospel teaching on justice, and the working of salvation in human history (*Gaudium et spes* n.32). Solidarity is linked to the development of salvation in

history and prescribes the way communities ought to be connected with each other and how the Church is to relate to the modern world (Clark 2014, 20).

Hollenbach and Curran note that in *Gaudium et spes* the Council makes one of its few negative judgements: it condemns the separation of faith from daily life in the world, the spirituality of detachment (Curran 2002, 32; Hollenbach 2005, 273). This is clear in the famous opening paragraph: "The joys and the hopes, the griefs and the anxieties of the men of this age, especially those who are poor or in any way afflicted, these too are the joys and hopes, the griefs and anxieties of the followers of Christ" (*Gaudium et spes* n.1). The Pastoral Constitution also grounds human rights both in the communal nature, and individual dignity of the human person; and rejects Leo XIII's paternalistic "natural inequalities" for a strict stance against discrimination and the modern forms of inequality that prevail in the world: "any kind of social or cultural discrimination in basic personal rights on the grounds of sex, race, color, social condition, language or religion, must be curbed and eradicated as incompatible with God's design (*Gaudium et spes* n.29).

If *Pacem in terris* can be seen as cosmopolitan, in that it places the human rights of persons above state authority (or rather, state legitimacy depends on how well it safeguards human rights) (Christiansen 2005, 225), then *Gaudium et spes* can be seen as transformationalist: it holds that the "Christian faith calls the followers of Jesus to work to overcome whatever is distorted by injustice or oppression" (Hollenbach 2005, 275). It prefigures later discussions on "structural sin" formulated by liberation theology or "structures of sin" to John Paul II (*Gaudium et spes* n.25), and affirms the goodness of creation and the world, seeing that the Holy Spirit is moving in history and the struggle for rights and democracy are a manifestation of salvation history:

[a number of Catholic theologians] sought to mediate the meaning of Christianity to a modern pluralist and often conflictual society into the life and thought of the Church. For example, thinkers such as John Henry Newman, Maurice Blondel, Pierre Teilhard de Chardin, Henri de Lubac, Edward Schillebeeckx, and Karl Rahner (each in a different way) argue that God's grace is not extrinsic to human experience, understanding, society, or culture. Grace is immanent within history... The work of these theologians led the Council to adopt an explicitly theological approach to the social mission of the Church in the world (Hollenbach 2005, 277).⁴

Joseph A. Komonchak documents the French Thomist influence to the drafting process of *Gaudium et spes* and reminds us that the main opposition came from German bishops influenced by Augustinian thought.⁵ This distinction is more nuanced than a simple liberal vs. conservative. To Thomistic thought, human intelligence, understanding, and the natural world are created by God and therefore contain within themselves divine reflection and are necessarily good: "Sin is what falls short of or contradicts nature, and grace is what heals and transcendently fulfills nature" (Komonchak 1994, 87). To Augustinians, who argued against Aquinas even in the thirteenth century, the world is fallen and our "'true' nature is only recognized in the supernatural" (Komonchak 1994, 87). The German bishops accused the text of falling into naturalism and a naive optimism. Progressives also make similar critiques against the entire social encyclical tradition, arguing that Catholic social thought is naive in its call for a change of heart and for solidarity as the remedy for global problems; they state that the tradition does not take seriously the role of sin and conflict (class conflict, economic conflict and competition, interstate conflict, etc.) in the forces that shape the world (Curran 2002, 88). This is also one of the criticisms that Christiansen (2005) makes in his commentary on *Pacem in terris*, stating that

⁴ These theologians were all silenced by Pius XII as Garry Wills notes: "After *Humani Generis* [1950], directives for punishment were issued from Rome — silencing not only deLubac, but Jean Daniélou, Yves Congar, Marie-Dominique Chenu, Karl Rahner, Teilhard de Chardin, John Courtney Murray, and other leading liberal thinkers" (Wills 2014, 57).

⁵ For a comparison between Augustinian and Thomistic thought on civil society see Banner 2007.

the Catholic social tradition lacks a working notion of conflict and how power structurally operates.

Gaudium et spes also alters Leo's treatment of private property. Briefly, it recalls Aquinas' position that the poor have a right to take from those who have more than enough. In n.69 it states that the duties of justice demand that the poor receive not just the "superfluous goods" of others, but that they are owed what is required for their development out of need. To *Gaudium et spes* "the first and most important aspect of material goods is the common purpose of created goods to serve the needs of all" (Curran 2002, 180). The strongest statement on expropriation comes in Paul VI's *Populorum progressio*.

6.3. Paul VI and Integral Development

In terms of personality, Paul VI was very different from John XXIII. While John was warm, funny, with a charisma and diplomacy that was able to put through the changes that have forever altered the way the Catholic Church understood itself, Paul VI was "not nearly as affable or winning in this manner. The Italians used the word *amletismo* to describe Montini [Pius VI]. This referred to his Hamlet-like-indecisiveness and tendency towards depression" (Figueroa Deck 2005, 295). Allan Figueroa Deck recalls the controversy surrounding Montini's election as pope:

Some kind of rift had occurred between Pope Pius XII and Montini in the years before Pope Pius' death. Given that Montini was a faithful servant of Pius XII and his veritable right-hand man especially in matters of diplomacy, it is not clear why Pope Pius treated him so strangely... But he was never made a Cardinal by Pius XII, something that Pope Paul's biographer Peter Hebblethwaite calls 'unprecedented and unintelligible.'... When Roncalli [John XXIII] became pope, he immediately made Montini a cardinal... The main opposition to Pope John XXIII came from within the Roman Curia among a group of conservative Italian cardinals. Peter Hebblethwaite maintains that they most likely lobbied Pius XII

to send Montini away to Milan and not make him a cardinal (Figueroa Deck 2005, 295).⁶

The publication of *Populorum progressio* saw the establishment of Justice and Peace Councils in national Episcopal Conferences throughout the world, and firmly committed the Catholic Church and laity in the work of what the encyclical outlines as "integral development," "to seek to do more, know more and have more in order to be more: that is what men aspire to now when a greater number of them are condemned to live in conditions that make this lawful desire illusory" (n.6). Integral development means freedom from misery, security in subsistence, healthcare and secure employment. These things are necessary for the development of a full and meaningful life, and it is the dignity of the human person that grounds this right to development. Indeed the encyclical is most famous for its naming of the connection between development and peace: "development is the new name for peace" (n.76, 87).⁷

The encyclical also places the social above the right to private property (n.22): "This affirmation of the social purpose of private property is still the strongest to be found in Catholic social teaching... In PP [*Populorum progressio*] Pope Paul VI *inverted* his predecessors' approach to the topic by placing the social function before the individual right to private property" (Figueroa Deck 2005, 300). The encyclical makes a strong case for state expropriation to secure the common good:

If certain landed estates impede the general prosperity because they are extensive, unused or poorly used, or because they bring hardship to peoples or are

⁶ There is also a famous conspiracy theory that Paul VI was a homosexual who filled his Vatican appointments with other homosexuals. It is rumored that when Benedict XVI mentioned a homosexual conspiracy in the Vatican that seeks to undermine the Church, he was talking about this remnant clergy of closeted officials from Paul VI's time. According to this telling of the story, after Benedict's resignation, when Francis famously remarked on the plane back from Brazil in the early days of his pontificate, "who am I to judge" in the context of gay clergy, it is these homosexual Vatican higher-ups he had in mind.

⁷ Archbishop of Panama, Marcos McGrath, attributes this phrase originally to Bishop Manuel Larrain of Chile (McGrath 1993, 247).

detrimental to the interests of the country, the common good sometimes demands their expropriation. Vatican II affirms this emphatically. At the same time it clearly teaches that income thus derived is not for man's capricious use, and that the exclusive pursuit of personal gain is prohibited. Consequently, it is not permissible for citizens who have garnered sizeable income from the resources and activities of their own nation to deposit a large portion of their income in foreign countries for the sake of their own private gain alone, taking no account of their country's interests; in doing this, they clearly wrong their country (n. 24).

Throughout the development of Catholic social thought the state is seen as the guarantor of the common good. Curran distinguishes between Catholic and Lutheran conceptions of the state: "the Catholic view gives a more positive role to the state: pursuing justice, public well-being, and personal prosperity. The Lutheran understanding regards the state primarily in terms of preserving order" (Curran 2002, 139). As I mentioned earlier, to Catholic social thought, the state is the natural end of the human desire and striving for cooperation, while the dignity of the human person and the importance of the family play a role in tempering or limiting the state. In this way the Catholic social tradition has prided itself on walking the balance between individualism, with its roots in the political program of liberalism and the economic system of capitalism; and collectivism, with its economic and political programs of state ownership and socialism/communism. In *Populorum progressio* the balance shifts for the first time in the encyclical tradition towards a more fervent critique of the capitalist system and how it operates in international development.

Paul VI states that in working for justice, Christians will sometimes find themselves in collaboration with ideologically differing groups, particularly socialists, and that as long as the ends are just, such collaboration is warranted and permitted (n.26).

In the context of the end of a failed UN "decade of development" (the UN called in the 1970s for a second decade of development, since the 1960s attempt fell short of the goals), Paul

VI warns of an emerging "neocolonialism" and condemns the evils of global finance to developing nations. He reiterates *Quadragesimo anno's* phrase "the international imperialism of money" and names it as a systemic cause of underdevelopment (n.26). In the encyclical the term solidarity evolves to emphasize equality and is conceived of as the duty of all peoples and nations to work for each other (n.42), while the principle of subsidiarity is used to justify the need for a global government or authority to solve the problem of global poverty (n.33).

The most controversial portion of the encyclical is Paul VI's seeming endorsement of violent revolution (n.30-31), yet he states that such revolutionary desire and action often produces situations worse than the original. He thus opts for reform. This passage was often interpreted by liberation theologians as affirming the struggles against national security regimes on the South American continent (Sigmund 1990, 26).

Written before the critiques of development from dependency theorists, *Populorum progressio* nonetheless provides a strong impetus for the Latin American Episcopal Conference (CELAM) (established 1958) to develop their own critiques of development, formulate the preferential option for the poor, and endorse the establishment of Christian Base Communities (CEBs) at the 1968 conference in Medellin, Columbia (Mitch 2012, 120). Liberation theology was birthed in this period, and Paul VI took their critiques of development and applied them in his 1971 apostolic exhortation *Octogesima adveniens* and in his encyclical on mission, *Evangelii Nuntiandi* (Evangelization in the Modern World) (1975).

Octogesima adveniens describes the task of development not in terms of economics, but of politics and liberation (n.46). Paul VI refers to socialism(s) in the plural and fervently endorses democracy. Curran highlights that the exhortation links the struggle for equality and

participation with the historical unfolding of people coming to consciousness of human dignity and freedom (Curran 2002, 151); while Alfred Hennelly notes that it abandons the older suspicion of socialism's utopian thinking, instead seeing the utopian desire for a better world as being in line with an energizing prophetic vision (Hennelly 1979, 7).

The apostolic exhortation contains the first reference to the "preferential option for the poor" in the social encyclical tradition (*Octogesima adveniens* n.23). Christine E. Gudorf defines it as such:

Within liberation theology, the preferential option for the poor is closely connected with the epistemological privilege of the poor. While the preferential option for the poor demands that all Christians, the rich and poor alike, share and live out in action the divine priority for alleviating the suffering of the poor [connected to the ministry of Jesus in the Gospel account: God is on the side of the poor in the biblical tradition], the epistemological privilege goes a step further. It insists that the poor have a privilege in knowing, that is, a privilege in knowing God and in knowing certain aspects of the world relevant to the alleviation of poverty... They live in the place — poverty — where God has taken preferred root in order to support and comfort the afflicted (Gudorf 2005, 323).

Although addressed to Maurice Cardinal Roy, the president of the Pontifical Commission for Justice and Peace, it was actually written by Roy (Gudorf 2005, 316). According to Curran, this apostolic exhortation best represents the application of historical conscious methodology in the tradition (Curran 2002, 60). The most quoted lines of the letter are seen by most as a move towards democratization of the Church itself, and a decentralization of authority:

In the face of such widely varying situations it is difficult for us to utter a single unified message and to put forward a solution which has universal validity. Such is not our ambition, nor is it our mission. It is up to the Christian communities to analyze with objectivity the situation which is proper to their own country, to shed on it the light of the Gospel's unalterable words and to draw principles of reflection, norms of judgement, and directives for action from the social teaching of the Church... It is up to these Christian communities, with the help of the Holy

Spirit, in communion with the bishops who hold responsibility and in dialogue with other Christian brethren and all men of good will, to discern the options and commitments which are called for in order to bring about the social, political and economic changes seen in many cases to be urgently needed (n.4).

Published right before the 1971 Episcopal Synod on justice in the world, it is interpreted as a papal encouragement for the bishops to formulate their own voice in matters of social justice and international problems. Indeed, the usual protocol is for the pope to issue an apostolic exhortation *after* a synod, which becomes the authoritative document on the issue discussed. We saw this recently with the 2015 synod on marriage and the family, and the publication of *Amoris laetitia (The Joy of Love)* (2016) afterwards. By publishing an apostolic exhortation, not an encyclical, before the synod, commentators note that Paul VI was not trying to overshadow the council or move it in a certain direction, but expressing the desire for a democratic Church. The bishops wrote their own document after the synod, *Justicia in mundo* (Justice in the World) (1971). Before I move onto the next section, it is important to note that *Humanae vitae* (1968) overshadowed all these transformations in Catholic social teaching, and began the long obsession with the Church's moral teaching on sexuality and family planning to the detriment of "our best kept secret." Furthermore, *Evangelii nuntiandi*, considered by many to be Paul VI's most important social encyclical, ties evangelization to development, and links development to the political term of liberation.

6.4. *Justicia in Mundo* (Justice in the World) (1971), a Democratic Church, and Liberation Theology

Near the closing of the Second Vatican Council, Paul VI issued a pastoral exhortation commemorating the tenth anniversary of the founding of CELAM. In it he outlined his concern for two models of the Church. One is the triumphalist model which was aligned with the status quo and supported injustice: "In Chile and Columbia Our Lady, Mary the mother of Jesus, was

regarded as honorary commander in chief of the armed forces. In Brazil, the arch-reactionary Cardinal Sigaud equated modest proposals for land reform with 'atheistic communism'"

(Hebblethwaite 2007, 180). Ondina E. and Justo L. González write:

After the fall of the military regime in Argentina, officers of the Air Force told of priests blessing their endeavors as they took off in helicopters carrying suspected 'subversives' to be dumped alive into the ocean miles away from land. Some church leaders in Chile celebrated the death of President Allende and the rise of dictator Augusto Pinochet with thanksgiving masses (González and González 2008, 260).

The second model was the one outlined in *Gaudium et spes* which saw actions on behalf of justice for the poor and marginalized as being an essential part of the mission of the Catholic Church and Catholic spirituality. Indeed, *Justicia in mundo* reiterates this call in its most famous lines: "actions on behalf of justice and participation in the transformation of the world fully appear to us as a constitutive dimension of the preaching of the Gospel, or in other words, of the Church's mission for the redemption of the human race and its liberation from every oppressive situation" (introduction). The interpretation of the sentence became controversial later. As Kenneth R. Himes notes: "Arguing against 'constitutive' was a way of diminishing the import of the social mission while defending 'constitutive' became a badge for those who supported social activism" (Himes 2005, 341).⁸

Before tackling liberation theology, I will highlight the important contributions *Justicia in mundo* made to Catholic social thought, as, in many ways, this single piece shows the direction in which the social teaching was headed before the pontificate of John Paul II. It represents the culmination of the entire progressive period in this moment of Catholic history.

⁸ Himes also notes that John Paul II mentions this sentence only twice and both times he changed the word constitutive to integral and indispensable (Himes 2005, 354).

First, as I mentioned before, it is a document written by the bishops themselves, not an apostolic exhortation or encyclical summarizing the findings of a synod. And many see it as an assertion of the Medellin conference applied to the level of the universal global church: "the tone, methodology [discerning the signs of the times], and outlook of JM [*Justicia in mundo*] are reflective of the documents of CELAM" (Himes 2005, 340).

Second, in section 3.1. the document calls on the Church itself to implement the policies that Catholic social thought has been advocating, such as a just wage to workers in Catholic institutions, opportunities for advancement, social security, and positions of power in the administration of the Church and Catholic organizations. It also calls for the rights of women in the Church, and to make their own a share of the responsibility. Hence, a Church that works for justice must itself be just.

Third, the document puts a great emphasis on the work of educating for justice (section 3.2). And the way this is outlined in the document runs parallel with Paulo Freire's method of consciousness-raising or "conscientization." In section 1.1, it also mentions an emerging ecological awareness in reaction to the cost of both capitalist and socialist development.

Lastly, it affirms Paul VI's right to development and endorses "responsible nationalism" (section 1.2.; Clark 2014, 17). Himes defines this responsible nationalism as a "group's awareness of the call to progress" (Himes 2005, 343). It is a balance between globalization and economic protectionism; between the forces of globalization emerging at the time and the need for some "economic nationalism."

It is in this period of the early 1960s that reactionary forces began mobilizing around the world. In Latin America, right-wing groups, supported by recalcitrant Church forces supporting

the status quo, began to organize their own grassroots movements. One of the groups rejecting the Second Vatican Council reforms was Opus Dei, a group which emerged in Spain in the 1930s and supported fascism and dictatorial governments, as long as they supported the Church (González and González 2008, 242). In Brazil in 1964, the movement "Society for Tradition, Family, and Property" led a mass march in São Paulo, which the military used as a sign to carry out a coup (Hanson 1987, 104; Sigmund 1990, 24).⁹

American-led development came to Latin America in the early 1960's with John F. Kennedy's Alliance for Progress. As I said earlier, reactions to this "developmentalism" led to organized resistance in educational institutions that eventually found their way into theology. This is the period of the early emergence of liberation theology, which became more widespread as development morphed into US support for national security regimes. Particularly with the Nelson Rockefeller Report, prepared for the Nixon administration in 1968, the US saw the militaries of the continent as the only stable element to protect the capitalist development agenda, while the report saw the Catholic Church as immature and little better than university students (McGrath 1993, 250; see also Dussel 2001, 36-38). A decade later the Kissinger Committee's report reiterated the same view, and tied financial aid in the area to the states who saw the victorious implementation of military dictatorships.

Liberation theology grew throughout this period of unfolding national security regimes in the region; regimes which, beginning in the 1960s in Brazil, gained speed in the 1970s and

⁹ As in Franco's Spain, the Catholic hierarchy originally welcomed the coups in Latin America as a way of fending off the chaotic forces of communism (Anderson 2009, 52). Also Anderson notes that these regimes had a Catholic restorationist and corporatist structure. In the 1970s the national bishops conferences began to shift their focus and call out the human rights abuses of national security regimes, particularly notable here is Brazil's call for a day of fasting in 1975 (Anderson 2009, 59).

1980s.¹⁰ Once in command, the militaries began cracking down on students, unions, and political organizations. In this chaotic period Christian Base Communities (CEBs) were being formed with the support of the hierarchy.

Originally organized as a means to solve the "pastoral crisis" in rural areas, CEBs quickly developed a liberationist focus in implementing the "see, judge, act" method of theological reflection in their local communities (Dawson 2007, 111). Supported by the Latin American bishops and the reforms of Vatican II, the CEBs were a manifestation of a new "popular Church" or "Church of the people." These Catholic movements found legitimacy in *Lumen gentium's* "people of God" ecclesiology, which underscored the role of the laity as a "priestly people" supported by scripture. Thus decentralization and the democratic power to interpret the situation as the communities see it, led the Church to become a force against the violence and social injustice which characterized the dictatorial situation in Latin America. Alongside an official hierarchy which, for the most part during this period, lent support to these movements, the Church began to document human rights abuses; provide material support for victims, the oppressed and their families; and issue pastoral letters and declarations on human rights (Anderson 2009, 68-71 and 87-91). With the return to democracy, the documentation of abuses helped convict military officials and their political cadres, while the Church helped with the establishment of truth and reconciliation commissions to aid the transition to democracy.

Liberation theology emerged out of the movement of CEBs but is not synonymous with the CEBs. That is, liberation theologians stress that they are writing and reflecting on the experience of the popular Church; they are not directing it (Segundo 1985, 140). Andrew

¹⁰ "Following growing political instability, a wave of military coup d'états — Brazil (1964), Argentina (1966 and 1976), Peru (1968), Ecuador (1972), Uruguay (1973), Chile (1973) — ousted elected governments" (Heynes 1998, 47).

Dawson notes that the socio-political critique of liberation theology was in place before the mid-1970s:

it was only via its engagement with the nascent CEB movement that Latin American liberation theology was fully enabled to root itself within the lived experience of the masses at the base. Without this praxiological grounding, liberation theology would neither have been able to articulate the sufferings of the poor, nor been allowed to claim the representative status upon which so much of its credibility continues to rest (Dawson 2007, 121).

The main difference between liberation theology and the tradition of Catholic social thought is expressed in Gustavo Gutiérrez's book *A Theology of Liberation*, in which he posits that the class struggle exists, and that neutrality to the class struggle is impossible (1988 [1973], 157-159). As this chapter has highlighted, the Catholic social tradition reiterates the Marxist critique of capitalism but not socialism's proposed solutions. Its own solutions tend towards a reform of morals; indeed, a common parable, constantly retold, especially in the social encyclicals of John Paul II, is the story of the rich man and Lazarus; the rich man did not hear the poor knocking on his door. Like the World Economic Forum's Council on Values, contemporary Catholic social thought seeks ways of making capitalism more equitable through a change of heart and the promotion of values.

Paul Sigmund outlines seven aspects of liberation theology. (1) Its focus on *praxis*: liberation theologians hold that theology is a secondary act emerging from socio-political engagement. This represents to them a radical break with older models of theology that posit abstract deductions on the relationship of humans and God first. (2) In liberation theology the focus is on the poor, and the theologian advances the "preferential option for the poor." (3) It is rooted in the Bible, particularly Luke's call that the mission of Jesus is the fulfillment of Isaiah's call to preach the good news to the poor, proclaim freedom to captives, and liberate the

oppressed. Also important are the the Magnificat of Mary, the Last Judgement of Matthew, and the story of the Exodus. (4) Liberation theologians maintain that the poor are experiencing oppression; therefore, the solution is liberation. (5) Liberation theology relies on the "social sciences," and this usually means utilizing Marxist analysis and the theory of *dependencia*. This scholarship advances a specific way of liberation: "the (self-) liberation of the poor from dependent capitalism." (6) Later on in its development, liberation theology recognized that it was not just capitalism from which the poor of Latin America needed liberation from, but also the legacy of colonialist racism against the indigenous peoples, sexism, and other forms of oppression. (7) Finally, is the recognition, early on in the movement, that central to the theology would be a focus on local grassroots movements, particularly the CEBs and their importance as a force "to press for social change and to develop among the poor an awareness (*conscientização*) of the spiritual and material problems, and the possibilities of taking collective action to remedy them" (Sigmund 1990, 7-9).

As the repression from dictatorial national security governments grew wider — targeting students, intellectuals, trade unionists, indigenous activists, rural land reformers, and religious clergy — a new period of martyrdom increased the moral legitimacy of liberation theology. First to die was Camilo Torres, the leader of the "Golconda priests," a group of fifty priests who came together in Columbia in 1968 to call on the Church to support revolution. His death is seen to have galvanized the region (Hanson 1987, 108). Archbishop Oscar Romero is perhaps the most famous case, and I mentioned his death in the second chapter. There was also the murder and raping of Maryknoll sister Maura Clarke alongside three other missionaries in El Salvador in 1980, and the murder of six Jesuit priests with their housekeeper and her daughter in 1989. While none of these religious workers were liberation theologians in the strict sense, their deaths

show how dangerous it was to fulfill the call of social Catholicism to work for the poor within the national security situation of Latin America. But, "[j]ust when liberation theology seemed poised for its greatest expansion, a pope appeared who was hostile to it" (Habblethwaite 2007, 182).

John Paul II is notorious for his attack on liberation theology. Coming from communist Poland, he embodied a northern European anti-communism that was reflected in his papacy. Hans Küng was perhaps the first to break the silence about how John Paul II and Joseph Ratzinger, in his role as head of the Congregation for the Doctrine of the Faith, "betrayed" the Second Vatican Council. In his early estimation, Küng states that the Roman Curia hated the reforms of Vatican II and saw it as a regrettable "theologians council." The College of Cardinals elected Karol Wojtyla because "[h]e was the media-wise 'great communicator,' the man who with charm and flair, with athleticism and symbolic gestures, could present the most conservative doctrine or practice as acceptable" (Küng 1987, 66). The next chapter will highlight not only the development of Catholic social thought in this period, but how the papacies of John Paul II and Benedict XVI have, in many ways, reversed the progressively significant elements of the immediate post-conciliar period. In so doing, they aligned the Church further with the American liberal project and its hegemony within the globalizing interstate system of historical capitalism.

7. Cold War and Post-Cold War Postmodern Conservatism: A Conservative Defense of the Liberalism of the American Hegemon

This new period in Catholicism continued the convergence of liberalism and Catholic social thought, but no longer with the progressive democratization, decentralization, and openness to the world. Instead, Catholic social teaching changes to a conservative defense of American liberal hegemony. I mentioned the importance the Church played in the "third wave of democratization," and most scholars mention that the Church played a pivotal role in Eastern Europe and Latin America (and to a lesser extent Africa) (Anderson 2009; Heynes 1998 and 2012). However, the hierarchy took very different positions to the movements in these two regions. In Eastern Europe, it fomented dissent against socialism, while in the Latin American scene, it tried to quell the organic resistance coming from Catholics against the military dictatorships and national security regimes that came to characterize politics in the region.

During the period of heightened globalization, the long pontificate of John Paul II has helped secure a strong position for the Church in the post-Cold War period; a period characterized by the importance attributed to transnational civil society in the globalization paradigm I mentioned in the introduction. This strong and esteemed position has led José Casanova to famously call John Paul II the first citizen of a global civil society. He specifically says:

The pope has learned to play, perhaps more effectively than any competitor, the role of first citizen of a catholic, that is, a global and universal, human society. It just happens that this role is often in tension with his other official role as infallible head and supreme guardian of the particular doctrines, laws, rituals, and traditions, of the *Una, Sancta, Catholica*, and *Apostolica* Roman Church (Casanova 1997, 134).

Although Küng holds that John Paul has betrayed the council, Hehir and others show that the way he carries out his mandate is in accordance with *Gaudium et spes*. John Paul uses the Church's engagement with the modern world for social purposes, and although he constantly reiterates his claim not to be engaging in politics, his social agenda has had major political consequences (Hehir 1993, 39). Also, John Paul's historic role in the defeat of communism is in keeping with the spirit of social engagement advocated in *Gaudium et spes* and the role of religion in civil society emphasized in *Dignitatis humanae*.¹ Here we see the blurring of modern secular differentiation in light of American-led globalization paradigms and the influence given to religion in the international civil society.

John Coleman identifies this apolitical posturing as one of the four major weaknesses that he identifies with Catholic social teaching.² "Avoid politics and concentrate on the social question" should really be read as "[a]void the appearance of politics (in order to protect the institutional interests of the church) and concentrate, moralistically, on the social question" (Coleman 1990, 40). This moralizing of the social question is seen in John Paul's contribution to the social encyclical tradition. Instead of attacking capitalism and its structures, he attacks mainly consumerism; instead of talking about the exploitation of workers under capitalism like all the social encyclicals of his predecessors, *Laborem exercens (On Human Work)* (1981) develops a theology on the subjective benefit of work (a spirituality of work). This moral focus on the way capitalism affects the individual, rather than a focus on the structures of capitalism, is

¹ John Anderson quotes conservatives Samuel Huntington and George Weigel on this point (Anderson 2009, 8-10). Huntington was the first to name the late 1980's as the "third wave of democratization" and showed how Catholic support for democracy, human rights, and the role of religion in civil society were instrumental in the movements that achieved the transitions to democracy (Anderson 2009, 47).

² The other three he mentions I have touched on in other sections, (1) the tradition's economic thought does not pay enough attention to increased productivity, only about wealth distribution; (2) Catholic social thought is too idealistic in its assumption of the possibility of social harmony; and (3) it has been unable to formulate workable alternative institutions to liberal or socialist structures (Coleman 1993, 39).

a part of his "personalist" theology, and commentators are quick to point out that this in no way corresponds to liberalism's individualism (Clark 2014, 24; Lamoureux 2005, 393).³

Manuel A. Vásquez and Marie Friedmann Marquardt characterize his pontificate as postmodern. They write:

John Paul II walks a fine line between Catholic anti-modernism and modernism. On the one hand, unlike Pius IX in his *Syllabus of Errors* (1864), he does not reject modernity *tout court* in favor of tradition. On the other hand, he does not share Vatican II's optimistic endorsement of modern progress. For John Paul II, the task at hand is not to update a Church that has fallen behind the times, but to redeem a modernity that has lost its bearings (Vásquez and Friedmann Marquardt 2003, 179).

They say he "pulls the rug out" from under liberalism's monopoly on human rights, in a way "deterritorializing" human rights and modernity's liberal nation-state, and adds them to the agenda of the Church, in effect "making them part of the church's claim to universalism" (Vásquez and Friedmann Marquardt 2003, 183). Jeff Haynes reiterates this point in his discussion about fundamentalist religion more generally: the failed project of modernity, a failure witnessed in the growing sense of malaise and dislocation, gives rise to "a wave of socio-political religiosity" (Haynes 1998, 212). Fundamentalism to Haynes, is an essential characteristic of religion in postmodernism.

Haynes also suggests throughout his whole work that the conservative turn that John Paul II represents to Catholicism has allowed the Catholic Church to grow during a difficult period. Alongside right-wing protestant religions, the Catholic Church under John Paul II avoided the

³ Meghan Clark describes John Paul II's personalist philosophy as a continuation of the theme of the individual within community (liberal individualism versus socialist collectivism) that Catholic social thought has always tried to balance: "This principle, thus formulated, lies at the basis of all human freedoms... this Personalism must not be confused with individualism. The human being is not a human person on one hand, and a member of society on the other. The human being as a person is simultaneously a member of society" (John Paul II quoted in Clark 2014, 25).

decline of liberal Christianity. This echoes Chris Hedges' observations in his work *Death of the Liberal Class* (2010), and reiterates the world-systems analysts' thesis that in periods of hegemonic breakdown, liberalism goes into crisis, losing its ideological legitimacy in a world giving way to polarization. To Hedges, traditional liberal institutions in America (the protestant liberal churches, the university, labour unions, and centrist politics) are losing their appeal to the vast majority of the polity because liberalism as an ideology never delivers on its promises. "The vital center" promises to bring economic growth coupled with freedom and opportunity, but in the situation of rising plutocracy (financialization at the end of a hegemonic cycle), liberalism's universal posturing loses its appeal.

It might be best to describe John Paul II as conservative neoliberal, but as Samir Amin holds, neoliberal, as a term, is nonsensical. What we are witnessing is just another phase of liberalism, or rather, the unfolding of liberal ideology and economics which world-systems analysts maintain has happened before. Hence I prefer to see this period of Catholic history as a conservative defense of the liberalism of the American hegemon.

The Catholic Church, and world religions more generally, have benefited from globalization. The deterritorialization of nation-state sovereignty which globalization has brought (but this does not necessarily mean the weakening of the interstate system), and the development of a supranational level of international relations, where finance capitalism and the international civil society has placed itself, has allowed the Church to escape from the "straightjacket" of the nation-state and grow as a part of the explosion of global civil society in the post-Cold War era (Casanova 2001, 433). Like finance, the Church in a globalizing interstate system acts over and above the individual nation-states, even though the work of the Church is always located within nation-states; hence, a supranational jurisdiction is afforded to these global

institutions. The situation favors the Church, and John Paul II's focus is not on structures of economic injustice, but on personal morality — this is the role liberalism accords it within the religious function system. In this way he maintains the appearance of secular differentiation, claiming to stay within the borders of the sphere of personal morality assigned to religion under secularism. Charles E. Curran, Kenneth R. Himes, and Thomas A. Shannon elaborate this strategy in the social encyclical tradition:

Although some earlier documents of Catholic social teaching proposed particular solutions, there has been a reticence since John XXIII to go into detail when discussing the means of reform. As with SRS [*Sollicitudo rei socialis*], recent papal statements endorse certain goals — less inequality — and propose broad norms to guide reforms — participation — yet refrain from endorsing particular means. Undoubtedly one reason for this is to avoid going beyond the Church's competency as a moral teacher. Another motive is to prevent the Church from becoming identified with a particular political or economic ideology (Curran, Himes, and Shannon 2005, 424).

Although the older encyclicals shared this tendency too, they courageously called for systems of international governance and the duty of public authorities to intervene on behalf of the common good. In the progressive period they saw a robust role for the state to intervene for the common good. The social encyclicals of John Paul II move toward an individualistic morality, even in their treatment of the socio-political and economic realms. Although the uneven criticism of socialism over capitalism is present in his social encyclicals, by engaging in a critique of capitalism's moral failings, John Paul II is able to maintain a veneer of objectivity in his campaign against communism. Only after the collapse of communism, did the Church celebrate the role it played in its falling. As Derrida mentions:

Who could deny it? If an alliance is in the process of being formed, it remains a holy alliance. The paternal figure of the Holy Father the Pope, who is then cited by Marx, still figures today in a prominent place in this alliance, in the person of

a Polish bishop who boasts, and in this he is confirmed by Gorbachev, that he was not for nothing in the collapse of communist totalitarianism in Europe and in the advent of a Europe that from now on will be what it should always have been according to him, a Christian Europe (Derrida 1994, 125).

7.1. American Liberalism, Postmodern Conservatism: Four Social Encyclicals

John Paul II, the "philosopher pope" and theologian, wrote his social encyclicals personally, and although his three social encyclicals do maintain the traditional anti-capitalist suspicions, these are downplayed and shifted. As Hauke Brunkhorst notes, "Sometimes, eventually, religious communities do both, they criticize capitalism in theory and support it (and some of its most important ethical values) in practice, as was the case of... the Roman Catholic Church under John Paul II" (2011, 143). Indeed, the Church's position on economic issues has differed widely throughout this period, despite claims of an unchanging tradition.⁴ Charles Curran analyzes the way that continuity is produced in the social encyclical tradition:

John Paul II exemplifies this approach. He wrote *Sollicitudo rei socialis* to commemorate the twentieth anniversary of *Populorum progressio*... In reality, significant discontinuities exist in the body of Catholic social teaching... This overemphasis on continuity with 'our predecessors of happy memory' and failure to recognize significant discontinuities lend some credence to [Marie-Dominique] Chenu's thesis [from 1979] that Catholic social teaching has become an ideology (Curran 2002, 117).

Continuity can be stressed because each document claims to be responding to contingent social changes while, overall, the principles themselves remain unchanged. This position is possible because the principles themselves are kept general, while actual practices (i.e. predatory lending, the specific mechanisms of world debt, financial instruments) are not necessarily mentioned or condemned. Indeed, the vagueness of the encyclical tradition, an ambiguity which reaches its

⁴ Christine E. Gudorf humorously notes: "So alien had the concept of developing Church teaching been in the Catholic Church that for at least half a century students and faculty at Catholic seminaries have joked about the tendency for popes to introduce documents that reversed the teachings of their predecessors with the words 'in continuity with the teachings of my predecessors...'" (Gudorf 2005, 320).

height with John Paul II, allows socialists and capitalists to praise these documents as supporting their ideological positions. This is a primary difference between the Church's response to the "social question" and its reaction to the "sexual question," which I will address later.

While the preceding period tried to deal with the possibility of working alongside socialist and progressives for social justice, John Paul II reverts back to the older condemnations of Marxism (which include to him communism, socialism, social democracy, and he even condemns the welfare state). In *Laborum exercens* (On Human Work) (1981), his first social encyclical, he states that the problems with industrialized liberal capitalism is the way it places capital over labour (n.13), the socialist scheme also separates labour and capital and pits them into the class struggle, which it fights not only ideologically, but politically (n.11). Hence, class conflict is the fault of socialists fighting against capitalism, not the inevitable result of capitalist exploitation. Patricia A. Lamoureux says that the assumption of the possibility of class harmony is a remnant of Leo XIII (2005, 396), but in many ways it is characteristic of the entire social encyclical tradition, although the progressive period leaned more towards the solution of the intervention of public authority and noted the inevitability of class conflict given the globalizing nature of liberal economic models.

Laborum exercens positions the rights of labour in the larger context of human rights grounded in the dignity of the person. The encyclical states that both capitalism and socialism treat the individual as mere instruments. John Paul stresses the priority of labour over capital. The encyclical contains the most thorough treatment on the just wage and repositions John XXIII's socialization as meaning not the responsibility of the state to intervene in the economy for justice, but instead, as a principle to advocate for just collusions between labour and capital; in particular, the possibility of joint ownership, sharing by workers in management and profits,

and shareholding by labour (n.14). These solutions have been suggested since the time of Leo XIII, and John Paul cites *Quadragesimo anno* n.29 (which cites *Rerum novarum*) that associations consisting of workingmen alone or workingmen with their employers can bring the classes together and share in the benefits of the company. This "socialization" of the business enterprise, rightly criticized as idealistic under present capitalist structures, is advanced as a means to promote worker participation and the principle of common use of material goods for all. That this is conceived of as possible within capitalism's present structures shows that the encyclical favors a reform of capitalism, while the socialist version of bureaucratic state enterprise is discarded as essentially unredeemable and condemned because in the socialist schema the person can never be the subject of work.

John Paul also brings in a distinction between the "direct" and "indirect" employer (n.17). This is lauded as a major advancement in the encyclical tradition by many. Briefly, the direct employer is the firm or company, while the indirect employer consists of the "many different elements that influence employment and conditions for employment... this comprises such things as labor legislation, labor unions, transportation systems, child care, job training, and, in particular, government" (Lamoureux 2005, 399). Especially in a globalizing world, the responsibility for creating the conditions for the possibility of employment, as well as complicity in the "scourge" of unemployment, fall to innumerable agencies, governments, and firms.⁵

The encyclical also contains the most thorough treatment of the just wage in the tradition. The social teaching has always held, since the time of Leo XIII, that the worker is entitled to at least a level of remuneration that is needed to support a family. John Paul brings in a focus on

⁵ We can think about the effects of global finance here, which I have dealt with throughout this thesis, and whether or not a state's debt servicing allows them to hire in the public sector, relieving unemployment and pursuing economic stimulus versus austerity.

the family wage as "a single salary, given to the head of the family for his work, sufficient for the needs of the family without the other spouse having to take up gainful employment outside the home" (*Laborum exercens* n.19). This discussion brings back the teaching on the role of women into the social question, which was interestingly lost during the progressive period. Even though it is rife with patriarchal and societal biases on where the proper role of the sexes should be in relation to the social picture, it does nonetheless recognize the freedom of choice for women to enter the job market. Again, however, with the increasing necessity of dual-income households in the period of centralized monopoly capitalism (capture at the top and stagnation of wages), this is also an idealistic call to reform.

The biggest criticism against the encyclical, however, is the spirituality of work that is proposed. Humankind's punishment to "toil" is cast in a positive light as being co-creators with God in the subduing of the earth. His famous statement "work is for the person, not the person for work" is a prescriptive ideal that bears little resemblance on the exploitative reality of capitalist labour practices. Since his cooptation of liberation theology language comes later on in his pontificate, there is no mention of structural sin in the encyclical; we have instead an idea that emerges that to toil in hardship is to participate in Christ's suffering and is thus redemptive. As I mentioned before, this encyclical downplays and rearranges the older tradition's critique of capitalist work.

Laborum exercens is most famous for its definition of solidarity. In *Gaudium et spes* solidarity is almost synonymous with interdependence, and the pastoral constitution mentions solidarity as an ethical call. *Populorum progressio* moves further and Paul VI situates solidarity in the increasing interdependence of a globalizing world, and states that the obligations of solidarity are threefold: the duty of human solidarity is shown in the aid rich nations must give to

poor nations; the duty of social justice and the restoration of equal relations between countries (particularly in regards to trade); and the duty of universal charity to ensure that all have what they need and that no nation advances at the expense of another (*Populorum progressio* n.44). *Justicia in mundo* links economic injustice and the lack of social participation, which keeps people from attaining their basic human and civil rights, and this is part of the "crisis of solidarity" (Clark 2014, 22). In *Laborum exercens* solidarity is described as an attitude, a virtue, and a principle: "Solidarity is mainly considered as an attitude, an outward direction toward other persons, their needs, and structures of society;" as a virtue it requires cultivation (this is further developed in his second social encyclical *Sollicitudo rei socialis* [*On Social Concern*] [1987]); and finally as a principle it is "a moral obligation that should be the guiding influence in people's lives and decision making" (Lamoureux 2005, 399).

Although disavowed, the encyclical is presumably written in response to the Solidarity movement in Poland:

Vatican sources maintain the encyclical is not a direct commentary on these tensions [between *Solidarnosc* and the communist government of Poland at the time]. Other's claim the pope's solidarity with the Polish workers is 'the socio-political base on which the encyclical is built'; that LE [*Laborum exercens*] is John Paul's 'philosophical defense of the Solidarity movement'; and that 'the Polish political scene seems to condition what John Paul II says about trade unions.' It is at least plausible that for this 'Slavic Pope' with a 'fierce Polish nationalism' the Polish situation was very much on his mind while formulating the encyclical (Lamoureux 2005, 390).

Sollicitudo rei socialis further defines solidarity as a "firm and persevering determination to commit oneself to the common good" (n. 38). In order to condemn "the logics of blocs" (the Cold War superpower conflict of socialist versus capitalist models of development), the encyclical proposes a view of the human family grounded in solidarity (n.20). While

"development is the new name for peace" in *Populorum progressio*, solidarity is the new name for development in *Sollicitudo rei socialis* (*Sollicitudo rei socialis* n.39).

In commemorating the twentieth anniversary of *Populorum progressio*, it reiterates the call for authentic and integral development, and for a right to development; but couples this with a new move within the social teaching: the "right to economic initiative" (n.15). This "right" is obviously leveled against the socialist model of development, and John Paul specifically attacks societal and bureaucratic structures that hinder the "creative subjectivity" of the individual.

In this encyclical John Paul appropriates the language of liberation theology. He talks about a preferential "love" for the poor: "This is an option, or *special form* of primacy in the exercise of Christian charity, to which the whole tradition bears witness" (*Sollicitudo rei socialis* n. 41). He also talks about "structures of sin" (not structural sin), which he defines as obstacles created by individual sin which impedes the realization of the common good, such as the "all-consuming desire for profit" and "the thirst for power" which in turn create structures that are difficult to remove or overcome; these structures then force others to sin in turn (*Sollicitudo rei socialis* n.36 and 37). González and González describe the cooptation of liberation language as one strategy that the hierarchy employed in its struggle against liberation theology:

Parallel to the physical persecution already described, liberation theology was challenged or threatened in three other ways: first, by a simplistic distortion of its tenets [which I will mention in the next section but concerns the CDF's two official criticisms of liberation theology]; second, by official action by church authorities [silencing theologians and admonishing Catholic politicians which I will also mention in the next section]; and third, by having its language coopted into traditional contents and thus rendered innocuous (Gonzalez and Gonzalez 2008, 263-264).

Curren, Himes, and Shannon, however, give a different explanation. They hold that what is happening with the use of liberationist themes is the Vatican's approval of liberation theology, and that *Sollicitudo rei socialis* is "John Paul's framework of a liberation theology built upon the idea of human development that could be utilized in various cultural contexts" (Curran, Himes, and Shannon 2005, 419). They also note that John Paul's trip to Latin America in 1987 was one of the most violent, particularly in Chile under Pinochet. He and Ratzinger began to realize that the US failed to promote economic and political development in Latin America; Ratzinger specifically developed a skepticism of the American model of development. This begins the moral critique of capitalism in the social encyclical tradition under John Paul II, but continues with Benedict XVI. In *Sollicitudo rei socialis* this is named "superdevelopment" and breeds a culture of excess and consumerism (n.28). The encyclical attacks the systemic campaign against birth, and this criticism of demographic concerns prefigures "the culture of death" discourse which finds its fullest articulation in Benedict XVI's *Caritas in veritate* (On Integral Human Development in Charity and Truth) (2008).⁶

Sollicitudo rei socialis begins the establishment of a binary between global North and global South, which allows it to cast the people of the global North as decadent consumers, perpetrators of the culture of death. This moralizing discourse fails to recognize the systemic "subalternization of the middle class" (Gayatri Spivak 2012a), or what older social encyclicals referred to as the fourth world (pockets of poverty in the developed world). In *Caritas in veritate*

⁶ "The culture of death" and "the culture of life" are central themes of the New Evangelization. "The culture of life" is an elaboration of Paul VI's call in *Populorum progressio* to build a "civilization of love," however, the culture of death discourse emblematically characterizes the politicization of the sexual/moral issues (gays, abortion, and euthanasia) that are central aspects of the papacies of John Paul II and Benedict XVI. I come to these themes later on. The "New Evangelization" was first coined in the Latin American context on the five hundredth anniversary of the founding of the Americas at the CELAM conference in Santo Domingo 1992. It was meant to stress a new model of evangelization in opposition to colonialism. It has since become conflated with prolife issues (Mitch 2012, 80).

this equating of the global North with the culture of death allows Benedict to cast "the sexual question" in Catholic social teaching as a problem of runaway human rights linked to the decadence of the global north: what he refers to as "a right to excess" (*Caritas in veritate* n.43).

The subalternization of the middle class is a development that accompanies the collapse of the social democratic welfare state. *Centesimus annus* (On the Hundredth Anniversary of *Rerum novarum*) (1991) attacks the welfare state in n.48. As I mentioned in Part Two, since the welfare state was a means to curtail the attraction of socialist alternatives in the core states, with the demise of communism in 1989, liberalism discarded its "capitalism with a human face."⁷ *Centesimus annus* continues in this line. Indeed, all of the social encyclicals of this period revert to an oversimplified mischaracterization of socialism that mirrors the reactionary preconciliar period. Daniel Finn notes: "In this regard John Paul II continues in the tradition of Leo XIII and Pius XI in not attending as carefully as he should to arguments from the left" (Finn 2005, 452). This one-dimensional mischaracterization was nuanced in the progressive Vatican II period, and John XXIII and Paul VI abandoned the condemnations of working alongside socialists and progressives in associational movements and organizations. Paul VI invited Saul Alinsky to advise him on how to support the worker's struggle when he was Archbishop of Milan (Figueroa Deck 2005, 296), made a distinction between Marxist analysis and Marxist ideology, and held that certain aspects of Marxism could be useful tools for Christians. John XXIII introduced the word solidarity to the tradition in reference to the way farm workers come together in their struggle for agrarian reforms, and he used the term socialization to stress the responsibility of the state (or public authority) to pursue economic and social justice. Johan Verstraeten notes that subsidiarity in John XXIII defends "a sort of social assistance state," while John Paul II's blanket

⁷ It is perhaps important to remember here Thomas Piketty's thesis that I mentioned in chapter 2: the Keynesian period was an aberration of capitalist progression.

and universal condemnation of the welfare state in *Centesimus annus* lends ideological support for American conservatives like Michael Novak, "who is oriented towards the corporate world" (Verstraeten 2005, 40).

Liberalism and capitalism are nuanced by John Paul II, and only "radical capitalist ideology," that rejects any judicial role of the state, is rejected. In the most famous paragraph of *Centesimus annus*, however, "'capitalism' is the model that should be proposed across the world" (Finn 2005, 453). John Paul answers the question of whether liberal capitalism as the triumphant force should be the model of the post-Cold War world order:

The answer is obviously complex. If by *capitalism* is meant an economic system which recognizes the fundamental and positive role of business, the market, private property and the resulting responsibility for the means of production, as well as free human creativity in the economic sector, then the answer is certainly in the affirmative, even though it would perhaps be more appropriate to speak of a *business economy*, *market economy* or simply *free economy*. But if by capitalism is meant a 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, then the reply is certainly negative (*Centesimus annus* n.42).

John Paul uses solidarity as a bridge between subsidiarity and socialization. He brings up the distinction between society and the state and holds that, although all have a right *to* property (not just the right *of* private property) (n.30), the various and "vital" intermediary organizations and institutions of the civil society are the best for ensuring that the universal destination of the goods of the earth are oriented toward all humans. This is an emphasis on the charity of the civil society, rather than the welfare programs of the "social assistance state." The state has a secondary function, to provide the "juridical framework within which economic affairs are to be conducted" (*Centesimus annus* n.15), but the state does maintain the duty to intervene if

monopolies create obstacles to development (n.48). Oliver F. Williams describes this as John Paul II's "communitarian democratic capitalism;" "the goal is to try to maintain the benefits of economic growth while trying to address the human concerns that come with creative destruction [Joseph Schumpeter's term]" (Williams 1993, 7). Although always disavowing Catholic social thought as a "third way," remembering the failures of the endorsement of corporatism in the past, John Paul nonetheless is introducing into the teaching the conservative moral defense of capitalism. Finn outlines Michael Novak's system of "democratic capitalism" in which "economic markets, political democracy, and the institutions of 'the moral-cultural system' acted as checks and balances for each other" (Finn 2005, 440). Jo Renee Formicola summarizes this economic vision as such: "to John Paul, a Christian-inspired economic system must be aided by the state, and must give primary responsibility for financial matters to individuals, groups, and associations rather than to oligarchies, monopolies, or governments" (Formicola 2002, 132).

It is important to note, as William F. Ryan mentions, that although Catholic social thought "has a high potential for challenging and even offering human healing to this globalized economic system that is generating so much poverty and environmental destruction... little of that potential is presently being deployed by the Church" (Ryan 2005, 250). As De George highlights "since 1989, in Poland where it played such a key role in countering communism, the church has placed its chips not on defending legislation protecting workers and consumers or on promoting the economic common good but on anti-abortion legislation" (De George 1993, 140). In his commentary of *Centesimus annus*, Hollenbach cites Max Stackhouse, who sees this encyclical as bringing the Catholic social tradition in line with Max Weber's "Protestant ethic" (Hollenbach 2003, 202).

While *Rerum novarum* and *Quadragesimo anno* understood that liberal capitalism and its resulting rapid urbanization leads to unstable families and "imperils human morality" (*Quadragesimo anno* n.135), *Centesimus annus* furthers the view that the moral/cultural issues are the main threat to society, and again, John Paul II significantly alters the traditional critique of capitalism by way of a global focus. Instead of the education for justice prescribed in *Justitia in mundo* John Paul calls for cultural education to counter the "phenomenon of consumerism" (*Centesimus annus* n.36). The "dazzle of an opulence" is what leads people to forsake their cultures and move to overcrowded cities (n.33), and marriage and family life suffer because people "consider themselves and their lives as a series of sensations to be experienced rather than as a work to be accomplished" (n.39). This leads to abortion and the culture of death. He makes the distinction between the economic system and a cultural/ethical system. The economic system is value neutral, while the cultural system requires "a change of lifestyles" and the promotion of truth against the dangerous tides of relativism. This goes back to *Sollicitudo rei socialis*, which holds that the focus of development is too often economy-focused to the detriment of the development of the moral and religious person: this moral and religious development is what integral development means to John Paul II and Benedict XVI.⁸ Indeed, Benedict's single contribution to the social encyclical tradition, written after the financial crash of 2008 and to commemorate the fortieth anniversary of *Populorum progressio* (hence also the twentieth anniversary of *Sollicitudo rei socialis*), is subtitled "on integral human development in charity and truth." As Finn notes, this focus on "truth" re-enters the social encyclical tradition

⁸ The right to development thus changes from stressing the socio-economic rights in *Populorum progressio* — that in order to pursue spiritual development people must first have security and their basic needs met — to a focus on development away from the socio-economic rights and rather, linking the right to development to the right to religious freedom. The right to development comes to mean the right to pursue spiritual, religious, and moral development.

with *Centesimus annus*: "The pope also notes that a proper understanding of freedom is not to be equated with self-love but obedience to truth" (Finn 2005, 436).

Griffin notes that ever since the drafting of *Dignitatis humanae* as Archbishop of Krakow, Karol Wojtyla tried to get his emphasis on the link between freedom and truth into the drafts, yet

Both DH [*Dignitatis humanae*] and the First Amendment recognized that religious truth does not provide a sound foundation for a civil right to religious freedom... Hence his papal teachings have weakened DH's juridical argument and reinstated the truth claims that plagued the preconciliar Church (Griffin 2005, 257).

Griffin cites Herminio Rico, who identifies three great moments of *Dignitatis humanae*: the first is "religious freedom replaces established Catholicism," second is "freedom of the Church against atheistic communism," and finally "the challenges of secularism and relativism" (Griffin 2005, 258). Briefly, John Paul II never accepted disestablishment, but opportunistically utilized the principle of free exercise as a human rights weapon against the communist regimes in Eastern Europe (the second moment that is seen in the writing of *Centesimus annus*). Beginning with John Paul II, but culminating with Benedict XVI, the battle for Catholic truth against relativism took the Church into the American culture war. This is the third moment and is seen in *Veritatis splendor* (1993), *Evangelium vitae* (1995) and *Caritas in veritate* (2008) where the two popes sought to "identify moral truths (on a range of topics, from abortion to capital punishment, homosexuality, marriage and social justice to contraception) that must become civil law. The result is a theory of civil law that is excessively entangled with theological doctrine" (Griffin 2005, 259).

In many ways, this third moment corresponds to Gayatri Spivak's "double-bind between liberty and equality:" between human rights and democracy (see also Chantal Mouffe 2006, 320). Just emphasizing (institutional) self-interest is not democracy, it is human rights, and "human rights not done well" (Spivak 2012b and 2014). The double bind between human rights and democracy is expressed in the double standard of the Church's advocacy in civil society in post-transition democracies and how they use their new influence in these countries (Anderson 2009, 108). Anderson notes:

In so far as the question of human rights was concerned the new Catholic leader [John Paul II] was an unashamed proponent of Vatican II teachings, though he was equally concerned to promote traditional Catholic teachings on sexuality, reproduction, and leadership roles within the Church. In consequence some have argued that whilst his commitment to human rights could not be questioned, his commitment to democracy was always secondary and dependent upon the moral choices that would be made by democratic governments (Anderson 2009, 98-99).

Democracy requires the balancing of self-interest in the forging of civil consensus, and requires that although others are different from me, "they are, supposedly, imaginable by me as equals" (Spivak 2014). And to be clear, this is not necessarily even a goal of the hierarchy.

Although Catholic social thought brings in the notion of rights coupled with duties, when it comes to the Church itself in the two conservative periods I am analyzing, what we see is recalcitrance in the face of democratic rules, especially with John Paul II: "In Hehir's words his style was good at pushing for change but for some he came across as 'too sure, too impatient, and immune to compromise on forging a civil consensus' in divided, post-transitional societies" (Anderson 2009, 99). *Caritas in veritate* notes with emphasis, "*The sharing of reciprocal duties is a more powerful incentive to action than the mere assertion of rights* (n. 43). Yet the Church's recent assertions of the institution's right to religious freedom shows its unwillingness to

cooperate with the duties towards the common good conceived juridically and democratically. I touch on this issue near the end of this chapter.

Caritas in veritate emphasizes the older socio-economic rights in its treatment on human rights, but these are used to contrast the global North from the global South; that we in the North use rights talk for a license to excess, when others around the world lack water, shelter, and food (*Caritas in veritate* n.43). This right to excess in the North has led to an "alarming decline in their birth rate" (n.43), which Benedict links as a cause to overall economic decline.

In *Caritas in veritate* Benedict takes the New Evangelization's call to build a culture of life to new levels. Benedict reminds us, in the aftermath of the financial collapse of 2008, that there is a "moral foundation" of finance (n.65), and tells Western labor unions to stop thinking only of themselves and to remember the poor in the rest of the world (n.64). The religious prose and theological language reaches confusing, conflating, and disorienting levels. Religious language, interestingly, is not a predominant feature of the older social encyclicals in their discussions of the "social question."

Caritas in veritate begins with a large treatise on love, then moves to a more authoritarian tone of truth (n.2-5): the whole text is permeated with a concern that the cultural mixing of globalization will lead to relativism (n.26). When put in comparison to *Populorum progressio* and *Sollicitudo rei socialis* we can detect a shift from justice to solidarity to charity in truth (n. 6). This triple move spanning sixty years summarizes the orientation of the social encyclical tradition and can be described as a change in support of American liberal hegemony in the Cold War and post-Cold War period.

To Benedict all environmental, labor, economic and development problems are tied to individual morality, yet universalized through reference to a general culture of death that characterizes our sinful humanity. It is not the excessive greed of the few as the older encyclicals stressed, but we are all guilty of participating in the culture of death, even those marginalized or just trying to get by. In fact, he states that the cultivation of a prolife stance will lead to the rich finally being able "to hear the poor knocking on their door" (n.28 and n.75). And this cultivated universal prolife ethic will also stop the economic plunder of the environment (n.48-52). He states that atheists are just as dangerous as fundamentalists (n.29), and says the dangers of putting the Earth before the rights of the individual man leads to neo-paganism (n.52). Here's the basic argument:

*Openness to life is at the centre of true development. When a society moves towards the denial or suppression of life, it ends up no longer finding the necessary motivation and energy to strive for man's true good. If personal and social sensitivity towards the acceptance of a new life is lost, then other forms of acceptance that are valuable for society also wither away... By cultivating openness to life, wealthy peoples can better understand the needs of poor ones, they can avoid employing huge economic and intellectual resources to satisfy the selfish desires of their own citizens, and instead, they can promote virtuous action within the perspective of production that is morally sound and marked by solidarity, respecting the fundamental right to life of every people and every individual (*Caritas in veritate* n. 28).⁹*

In this passage, we also see a return to a type of patrimonialism maintaining that it is up to the "wealthy" to promote virtue in citizens. Yet the encyclical does continue the balance between market fundamentalism and State collectivism that has famously characterized the Catholic social tradition. In n.38 he lays down his vision of the importance of civil society as a

⁹ Cardinal Joseph Bernardin was the first to ideologically link numerous Catholic issues under the umbrella of prolife with his phrase "a seamless garment." That is, war and economy, capital punishment and contraception, and abortion and euthanasia are all different areas that come together as prolife; this of course prioritizes abortion and obfuscates the social and economic justice elements of the tradition. Marvin Mitch also names this the "consistent ethic of life" (CEL) (Mitch 2012, 71).

regulating force between the market-state binary. The idea of the market-state binary is perhaps the most important development in this encyclical:

When both the logic of the market and the logic of the State come to an agreement that each will continue to exercise a monopoly over its respective area of influence, in the long term much is lost... The exclusively binary model of the market-plus-state is corrosive to society, while economic forms based on solidarity, which find their natural home in civil society without being restricted to it, build up society. The market of gratuitousness does not exist, and attitudes of gratuitousness cannot be established by law (*Caritas in veritate* n.38).

Both the business enterprise and political authority have a "*wide range of values*" and in the context of international relations, in some nations "the construction or reconstruction of the State remains a key factor in their development" (*Caritas in veritate* n.41). So Benedict continues in the older tradition stressing the importance of a juridical framework that the state provides for the market economy, but he continues in the conservative moralizing of his predecessor and brings in a strict emphasis on charity and the importance of civil society. The market-state binary is both a critique of market fundamentalism (where charity has no place) and an attack on welfare state models (where charity is forced).

In the next sections I treat three controversial areas in the pontificate of John Paul II. These controversies highlight the conservative shift in the Vatican's ecclesiological position.

7.2. John Paul II, Cardinal Joseph Ratzinger, and Liberation Theology

John Paul II's first international visit was the CELAM conference at Puebla, Mexico in 1979. At the 1972 CELAM assembly in Sucre, Bolivia, Monsignor Alfonso López Trujillo was elected general secretary. A conservative who rejected liberation theology, Trujillo was one of the first to coopt the language of liberation in his writings: "According to him, liberation from oppression was indeed at the very core of the Gospel, but this was to be understood in terms of

liberation from the oppression of sin. The poor did not merit special attention, but this was 'the poor in spirit'" (González and González 2008, 266; see also Dawson 2007, 123). Trujillo was later made Cardinal in 1983 and a member of the CDF (Sigmund 1990, 158).

Most expected the pope at Puebla to either condemn or accept liberation theology, but he did neither. He stated that liberation theology is correct in its focus on the poor, but that its method is wanting. Most famously he rejected the idea of "Christ as a political figure, a revolutionary, a subversive man from Nazareth," but at the end he upheld that a "transforming, peace-making, pardoning and reconciling love" are indeed revolutionary (John Paul II quoted in Hebblethwaite 2007, 183). Puebla was careful not to outright condemn liberation theology, as this would appear to be siding with the national security regimes that had taken power throughout the region. Yet, the conference also refrained from reaffirming the more radical elements of the Medellín conference of 1968 (González and González 2008, 265).

Although John Paul played the peace-maker, seeming to urge South American bishops to develop their own version of liberation theology in light of the work of liberation theologians (while filling episcopal vacancies with conservatives), the CDF under Ratzinger went on the offensive, silencing theologians and issuing its two "instructions" concerning liberation theology (in 1984 and 1986). Most scholars hold that *Instructions on Some Aspects of 'Liberation Theology'* (1984) is the more extreme condemnation. *Instruction on Christian Freedom and Liberation* (1986) is the milder; it seems to come to terms with liberation theology and puts an end to the conflict between the CDF and liberation theology (Curran, Himes, and Shannon 2005, 418; Sigmund 1990, 167).¹⁰ Hebblethwaite provides a different reading. He holds that the First

¹⁰ A week after the publication of the Second Letter, the pope wrote a letter to the bishops of Brazil. In it he condemned unbridled capitalism and urged them to develop their own theology of liberation "in full fidelity to

Instruction is actually one of the most radical documents to be produced in the Church. As I showed earlier in the case of Marxism in the social tradition — that in refuting the Marxist alternative, the teaching nonetheless agrees with the Marxist critique of capitalism — Ratzinger does the same thing with liberation theology; "unlike earlier condemnations in this century, there is no talk of 'errors' still less of 'heresy,' but merely of deviations" (Habblethwaite 2007, 187).

The Second Instruction however, should be read as an encyclical, since it comes mostly from John Paul II's hand. "It is an essay in Catholic social doctrine, to be placed in the line of *Mater et Magistra*, *Pacem in Terris*, *Populorum Progressio*, and *Octogesima Adveniens*" (Habblethwaite 2007, 190). To Habblethwaite there are a number of points in the Second Instruction which dangerously steer the Church away from the older encyclical commitments. (1) John Paul II reverses *Octogesima adveniens*'s democratic decentralization of power to the bishops and the local churches in formulating social teaching: "It pertains to the pastors of the Church, in communion with the Successor of Peter, to discern its authenticity" (p.70).¹¹ (2) The greatest threat to the Church is Marxism. (3) The way the Instruction spiritualizes poverty empties the scriptural supports of liberation theologians of any political meaning. John Paul cites the Magnificat and sees it solely in terms of salvation. (4) The preferential option for the poor is interpreted in a strictly charitable sense, and the poorest are "those children who, through human wickedness, will never be brought forth from the womb to the light of day" (p.68). (5)

church doctrine, attentive to the preferential, but not excluding or exclusive love for the poor" (John Paul II quoted in Sigmund 1990, 169).

¹¹ This brief window of decentralization allowed the US bishops to produce some of the most important documents in social teaching: *Brothers and Sisters to Us* (U.S. Catholic Bishops Pastoral Letter on Racism) (1979), *The Challenge of Peace: God's Promise and Our Response* (1983), and *Economic Justice for All* (1986). The ball stopped for the US bishops with their planned letter on the rights of women, and I mentioned the controversy with *Always our Children* in chapter 2 of this thesis. Nine years in the making, the letter on the rights of women was scrapped in 1992 after Vatican prodding. Progressives voted against it for fear of a repeat of *Humanae vitae* as the document's original purpose was perverted by constant conservative rewriting and Vatican scrutinizing. In 1977 the Canadian bishops produced an important document which influenced *Economic Justice for All*; Gregory Baum states that in *A Society to be Transformed* the Canadian bishops reject neoliberal capitalism and praise the plurality of economic solutions coming out of the Catholic community in Canada (Baum 2007, 208).

Those who abandon the path of reform for the myth of revolution will "encourage the setting up of totalitarianism" (p.78). And (6) John Paul sees as "criminal" what he calls the misdirecting of popular piety toward the earthly plan of liberation, "which would soon be revealed as nothing more than an illusion and a cause of new forms of slavery" (p.98). Habbblethwaite ends his piece with the 1992 CELAM conference in Santo Domingo to mark the five hundredth anniversary of Columbus' landfall in the Americas. It was no disaster to liberation theology because, as Habbblethwaite contends, the attacks on liberation theology were no longer needed; the language was coopted, reactionary bishops insured obedience on the continent, and support of right-wing Catholic groups ensured a balancing away from liberation theology (Habbblethwaite 2007, 195).

Liberation theologians themselves moved towards the center as well: "Without admitting he was doing so, Gutierrez continued to modify his approach and to emphasize the agreement between his version of liberation theology and the social teaching of the church" (Sigmund 1990, 171).¹² Leonardo Boff, on the other hand, continued his defiance, leaving the priesthood altogether after his silencing and ordeal with the CDF. In 1987 he flew to the Soviet Union and described it as a "clean, healthy society" and noted that the communists were interested in "our effort to create a synthesis of Christian faith and Marxist social analysis" (Sigmund 1990, 173). Boff was silenced in 1982 for his book *Church, Charism, and Power* (1981), in which he famously stated that "there has been a gradual expropriation of the spiritual means of production from the Christian people by the Clergy" (Sigmund 1990, 155, see also Cox 1988).¹³

¹² Gutierrez was never officially attacked by the CDF, instead Ratzinger tried to get the Peruvian bishops to condemn him; they refused because they felt it was inappropriate and because "they were appalled by Ratzinger's action, which undermined their own authority" (González and González 2008, 266). Karl Rahner also intervened and defended Gutierrez's orthodoxy (Segundo 1985, 17).

¹³ Charles Curran was also investigated and after an almost decades long investigation, barred from teaching in Catholic universities. Bernard Häring documents the interaction between Curran and Ratzinger and recounts one encounter: "One of Curran's questions was, 'Why am I being singled out when many have said the same things?'"

A hybrid Marxist-Christian politics characterized both Sandinista Nicaragua under Daniel Ortega and Allende's Chile. Eric Hanson recalls John Paul's visit to Nicaragua in 1983. The pope scorned Fr. Ernesto Cardenal for not resigning his position as Culture Minister as the Nicaraguan bishops demanded, and in his sermon,

the pope attacked 'unacceptable ideological commitments' and the dangers of totalitarianism, especially attempts by the Sandinistas to control the school curriculum. He then cited his pastoral letter of the preceding June to the Nicaraguan bishops in which he said that it was 'absurd and dangerous to imagine that outside — if not to say against — the church built around the bishop there should be another church... alternative and as it has been called recently, a people's church' (Hanson 1987, 96).

During the speech the pope was interrupted by chants shouting "between Christianity and revolution, there is no contradiction," and John Paul had to yell "silence!" on several occasions.

In his book-length response to the First Instruction, Juan Luis Segundo mentions the double standard operating with John Paul II's condemnation of violence and revolution in the Latin American context:

The Supreme Pontiff, in an emotional statement in Ayacucho (Peru), urged and demanded that the guerrillas of the *Sendero Luminoso* make peace and put down their guns. He did not, when he visited Nicaragua, urge or demand the same thing of the *contras* who — officially supported by the United States — fight against the state and the Nicaraguan people within and outside its borders (Segundo 1985, 152).

Anderson also mentions this double standard when he states "this ambiguity was in turn reinforced by John Paul II during his visit to Argentina in 1987, when he thundered against

Cardinal Ratzinger challenged Curran to support with specific names his assertion that many moral theologians are saying similar things or even going further. Curran was bewildered at first and then said, 'surely I am not expected to report on my colleagues!'" (Häring 1987, 246). Overall, Ratzinger silenced around five hundred theologians (Boff 2014, 78).

abortion and divorce but failed to mention the 'dirty war,' instead calling for an end to the pursuit of guilty officers in the name of reconciliation" (Anderson 2009, 112).

Segundo ends his book with a warning that the upcoming 1985 synod of bishops will attempt to rearrange the work of the Second Vatican Council. He states that what is at issue is not only liberation theology, but "*the negative evaluation of Vatican II and of the post-conciliar period...* It [the Church] should know in what theological, pastoral, and political context this issue will be posed" (Segundo 1985, 155). Indeed, the synod attacked the entire definition of the Church as the people of God, developed in chapter 2 of *Lumen gentium* (*The Dogmatic Constitution on the Church*), and the synod orchestrated the replacement: the Church as communion.

7.3. People of God vs. Communion and Roman Centralisation

Before the extraordinary Synod of Bishops in 1985, to commemorate and assess the twenty years since Vatican II, an interview with Cardinal Ratzinger by Italian journalist Vittorio Messori was released. The English title of the book was *The Ratzinger Report* (1985). In it he paints the years since the Council in the grimmest way: "Ratzinger's evaluation was so gloomy many readers thought he had been misquoted or his ideas wrenched out of context. But this turned out not to be the case" (Cox 1988, 79). As a result of the release the press became preoccupied with his statement that the devil is real and working in the world, which Harvey Cox believes mischaracterizes him as a "succubus-chasing throwback to the dark ages" and helps underestimate the prefect's plan to rearrange the Church away from the Council:

Ratzinger is a modern theologian. He has read Bonhoeffer and Barth, Kant and Descartes, the Protestant biblical critics, the death-of-God thinkers, the Catholic personalists. He has co-authored two books with Karl Rahner... He is, in this

sense, not a proponent of some 'restored Christendom' strategy. Indeed, throughout the *Report*, he explicitly rejects restorationist thinking (Cox 1988, 82).

Ratzinger was charged with an important role in preparing the synod, so his views on the Second Vatican Council confirmed the fears of people like Segundo. Cox outlines three concerns Ratzinger expressed in the interview. First is the exaggerated openness to the outside world which has diminished the missionary impetus and has led to the idea that all religions are equal. Second, he states that there is a decline in the courage of individual bishops which he attributes to the rise of regional and national bishops conferences like CELAM which produced documents that helped support the work of liberation theology. And third is the decline of strict moral teaching which he finds "reflected in radical feminism, the continued use of contraception by Catholics despite *Humanae Vitae* (Paul VI's 1968 encyclical, which ruled it out), and the call, especially in North America, for women priests" (Cox 1988, 81). And the *Report* attacks and utterly rejects the concept "people of God."

In the *Report* Ratzinger tries to downplay the importance of the term; he states that "the people of God" is an Old Testament theme, while the "body of Christ" is a New Testament theme. He holds that it should not be the only concept of Church and that those who use the concept do so because of "political, partisan, collectivist suggestions" (Comblin 2004, 53). "The Body of Christ" and communion go back to Pius XII encyclical *Mystici corpus* (1943), but the Council was clearly moving away from that model for a Church anchored in history and one that worked in the world and was affected by the world, not one that floated over the world unaffected:

The documents of Vatican II employ the images of the Body of Christ and the Sacraments, but the People of God became the dominant model. This latter understanding had deep biblical roots and also harmonized the Church with the Western trend toward political democratization that had been prevalent since the

eighteenth century... Emphasis on the institution and its visible elements [the body of Christ and the sacraments] will strengthen internal centralization with a view to enabling the 'perfect society' and transnational actor to compete effectively with national states. Use of the People of God encourages decentralization both with the international church and within national churches (Hanson 1987, 100).

José Comblin cites Cardinal Aloisio Lorscheider's written report to the Synod, which states: "The church as people of God is the key idea of *Lumen gentium*." Yet the final report says "The ecclesiology of communion is the central and fundamental idea of the Council's documents."

The Council has described the Church in diverse ways: as the people of God, the body of Christ, the bride of Christ, the temple of the Holy Spirit, the family of God. These descriptions of the Church complete one another and must be understood in the light of the Mystery of Christ or of the Church in Christ. We cannot replace a false one-sided vision of the Church as purely hierarchical with a new sociological conception which is also one-sided (Comblin 2004, 54).

Comblin concludes that the Council wanted a Church grounded in the Gospels and an ecclesiology that expressed the human reality of the Church to counter the preconiliar and even Tridentine ecclesiology of everything in the Church as divine. The Curial faction wanted to return to a Church free from the human criteria to be able to act like other powers in the world without affecting its divine reality,

The church would continue to be equally divine, no matter how it acted in the world... This was the very thing the Council wanted to change... The entire sector opposed to the council, the sector that has become so strong during John Paul II's pontificate, wanted to return to a church that struggles for power using the weapons at hand, such as support from the political and economic powers of this world. That is why it sought to eliminate the theme of the people of God, and it was successful in doing this, at least temporarily... The issue of the concept of the people of God is far from being a problem of terminology. It is the most important thing that the council said about the church; what is at stake is nothing less than the church's presence in the world (Comblin 2004, 56-57).

Communion is a vague word that expresses a relationship. It is tied into an ecclesiology that expresses an abstract understanding of the universal Church as mystical body in relationship to Christ, but politically, it ultimately means communion with Rome and the official teaching of the hierarchy. Communion also highlights a unity and Comblin cites John Paul's *Novo millennio ineunte*, which concludes with a statement on the relationship between the pope, the bishops and the spirituality of communion:

Consequently, the new century will have to see us more than ever intent on valuing and developing the forums and structures which, in accordance with the Second Vatican Council's major directives, serve to ensure and safeguard communion. How can we forget in the first place those *specific services to communion* which are the *Petrine ministry* [the pope] and, closely related to it, *episcopal collegiality*? (John Paul II quoted in Comblin 1988, 61).

Communion in this ecclesiology stresses the unity of obedience to the chair of Peter: "So communion means being in submission to the pope — and the pope decides everything, including who is or is not in communion with him" (Comblin 1988, 60).

In 1992 the *Congregation for the Doctrine of the Faith* released its *Letter to the Bishops of the Catholic Church on Some Aspects of the Church Understood as Communion*, which accuses some in the Church of "ecclesiological unilateralism" in that they understand the local and particular churches as complete in themselves and that the universal Church is nothing more than the sum of these particular churches. To Ratzinger this is an impoverishment of the unity which the concept of communion stresses:

The CDF then draws the conclusion: The universal Church 'is not the result of the communion of the churches, but in its essential mystery it is a reality ontologically and temporally prior to every individual particular church' (no.9). Ratzinger has already used this formulation in books published in 1989 and 1991, well before the CDF's 1992 letter. Obviously, this is Ratzinger's personal

formulation... 'she is the mother and not the offspring of the particular churches' (McDonnell 2002, 228).

Walter Kasper responded to the letter in 1999. This began what later became known as the Ratzinger/Kasper debate, and the debate concerns the nature of the universal and particular Church. Ratzinger could not easily dismiss Kasper in the way he did with dissenting theologians, as Cardinal Walter Kasper was a member of the Curia and was the President of the Pontifical Council for Promoting Christian Unity. Kasper was not only responding to the 1992 letter, but to John Paul II's *Apostolos suos* (On the Theological and Juridical Nature of Episcopal Conferences) (1998) which was written to clarify the 1985 Synod. John Paul's letter states that an episcopal conference only exercises full teaching authority when a unanimous agreement is reached on a decision. Kasper outlines three main concerns with these documents. (1) The authority of bishops seems to be only a "naked fiction" in the eyes of the pope. (2) The CDF's formulation of the relationship between the universal and particular churches is a development beyond Vatican II and "is, in fact, a reversal" (McDonnell 2002, 230). And (3) this reversal and dismissal of Vatican II is an attempt to restore Roman centralism.

Ratzinger responded by noting that the Synod chose communion as a better expression of the nature of the Church, and although communion is not a central theme of Vatican II, it serves as a synthesis of the Council's ecclesiology. He responds to Kasper's concerns of the universal Church being identified with the Roman Church (and hence the pope and curia) as an attempt to restore centralisation. Ratzinger says this is an interpretative leap and the CDF document does not identify the Roman Church with the universal Church. Ratzinger then brings in a discussion on "ecclesiological relativism" in relation to the writings of Leonardo Boff, who stated that the "historical Jesus" never founded a Church, and there is no reason why we cannot and should not

seek alternative church structures. Ratzinger then says Vatican II is the exact opposite of this relativism.

Kasper comes back and agrees with Ratzinger against ecclesiological relativism, on the self-sufficiency of the local church, and on the sociological reduction to the empirical church; but says that the idea of the universal Church as ontologically and temporally prior "presents great difficulties not only historically, but also biblically and systematically" (McDonnell 2002, 239). Kasper's point of contention is not the importance of the Church to save souls against the ecclesiology of Boff, but about the relevance of Ratzinger's "ecclesiological abstraction" about the universal Church being this mysterious pre-existent Church and not the actual Church which exists in and from the local churches.

Ratzinger's second response recognizes that Kasper's concerns are mainly about the authority of the local bishop and that the ecclesiology of communion is being introduced as part of a program of Roman centralisation. Ratzinger assures Kasper that these formulations are not about politics but about the relationship between God and the Church. He states, "The church of Rome is a local church and not the universal Church — a local church with a peculiar, universal responsibility, but still a local church... the fears voiced by Kasper are groundless" (Joseph Ratzinger quoted in McDonnell 2002, 242). Ratzinger tries to quell these fears by stating that he never attempted to equate the universal Church with the curia and pope.

Kasper's final response deals with the way Ratzinger has tried to focus on Kasper's equating of the Church with the empirical church, and the way that Ratzinger in his last response tried to tie him in with Boff's ecclesiological relativism (a type of guilt by association). Kasper notes that this accusation "received wide public attention and had made his task more difficult as

President of the Pontifical Council for Promoting Christian Unity" (McDonnell 2002, 244). He quotes Henri de Lubac, whom both men revere as a modern Church Father, who said, "A universal Church prior to all individual churches or seen as existing in itself apart from them, is merely an abstraction" and that the balance of the simultaneity of the local and universal Church is important (McDonnell 2002, 245). Finally, in the end he states that this divine-human reality and local-universal relationship of the Church is not merely a political reduction; it is essential to the pastoral mission of the Church. "Kasper does not allow the real pastoral issues of Roman centralism to be dismissed as church politics" (McDonnell 2002, 246).

Within this change of language and the debate that has taken place, we see that in its acquiescence to American liberalism, the Church itself does not become democratic, but rather, uses religious freedom for anti-democratic purposes. Religions in globalizing social systems undergo functional differentiation. In this process they do not become democratic institutions themselves but become structured in ways that come to serve the anti-democratic forces of liberal capitalism. I touch on this dynamic further in the conclusion but I want to highlight one more issue.

The main task of the New Evangelization begun under Pope John Paul II was promoting the newly issued *Catechism of the Catholic Church* (1997) which was put together by Ratzinger and Christoph Schönborn. The *Catechism* is a type of rule book for the universal Church and fundamentally undermines the autonomy of the individual believer to develop their own consciences. This document is also a part of the spirit of centralization and obedience to the magisterium (Gudorf 2005, 326; Küng 2013, 176). What is interesting to note is that it is the

task of the Pontifical Council for Promoting the New Evangelization to promote the *Catechism*.¹⁴ What does evangelization, traditionally understood as outreach to non-Catholics, have to do with promoting a rule book for people who are already Catholic? In the pontificate of John Paul II and Benedict XVI, the target of evangelization becomes the Catholic laity themselves, who need to be disciplined back into conforming to Church teaching, particularly on the sexual and family issues.

7.4. US Conservative Catholic Capitalists

Writing right before the release of *Centesimus annus*, John Coleman states that "contemporary social Catholicism has become a tradition of the welfare state (1991, 38). John Paul II, in celebrating the collapse of "really existing socialism," also gives a Catholic endorsement of the power of free markets in *Centesimus annus* (but insists of the necessity of it being tied to a strict juridical authority), and in one paragraph condemns the welfare state with his use of the principle of subsidiarity, referring to it as the "social dependency state" (*Centesimus annus* n.48). For most scholars of social Catholicism it seemed fairly clear that the tradition of Catholic social thought, in refuting both liberalism and socialism, was endorsing a form of social democratic welfare state. Whenever a social encyclical was produced before the era of John Paul II conservatives would go on the defensive; it was almost impossible to read in these earlier encyclicals a message that in any way supports liberal capitalism.

In this task — the task of voicing its stance on the social question — the Church has always been subject to attacks from elites. Firer Hinze notes that when *Quadragesimo anno* was published, Pius XI mentioned that "certain American industrialists prevented [it] from being read

¹⁴ Also interesting to note is the publication of the *Compendium of the Social Doctrine of the Church* by the Pontifical Council for Justice and Peace in 2003, another attempt to centralize and make coherent and seamless a radically discontinuous and changing tradition.

in local churches" (Hinze 2005, 169), while William F. Buckley famously remarked about John XXIII's *Mater et magistra* (1961): "mother yes, teacher no" (Mich 2005, 211). Even in John Paul II's social encyclicals, which begins an endorsement of liberal economics and politics in the teaching, conservative scholars reacted that the teaching still does not go far enough; they hold that the social question is still conceptualized in his encyclicals as one of uneven "wealth distribution," and that the teaching does not give full credit to the unique ability of capitalism's "wealth creation" (Curran 2002, 195; Weigel 2003, 29).¹⁵ Yet with John Paul II, even while repeating the older concerns about capitalism, the tradition shifts to a position that enables conservatives, especially in the US, to claim that they finally have a pope on their side (Formicola 2002, 123; Verstraeten 2005, 40).¹⁶

Recalling John Coleman's assessment on the value and practical purpose of the Catholic social encyclical tradition from my introduction (that these encyclicals for the most part never really influence government policy, but rather enable and encourage Catholics in their social justice work) we see a shift with John Paul II and Benedict XVI in who is enabled and encouraged by these changes in the Vatican. Self-professed neoconservatives Richard John Neuhaus (a Lutheran convert to Catholicism and author of *The Naked Public Square* [1986]), Michael Novak (author of *The Spirit of Democratic Capitalism* [1982] and *The Catholic Ethic and the Spirit of Capitalism* [1993]), and George Weigel (writer of the bestselling biography of Pope John Paul II: *Witness to Hope* [1999]) not only reacted favorably to the social encyclicals of John Paul II and Benedict XVI, but gained favorable treatment by the Vatican in their efforts to forge stronger ecumenical links with American conservative evangelicals.

¹⁵ *Caritas in veritate* (2008) frequently mentions the wealth creation of capitalism.

¹⁶ Curran cites Novak who says that "Vatican II accepted the American idea of religious freedom, and 'in *Centesimus annus* Rome has assimilated the American ideas of economic liberty'" (Curran 2002, 208). Küng notes that George Weigel was a personal friend of John Paul II (Küng 2013, 217).

Richard Neuhaus and George Weigel were cosignatories to the 1994 ecumenical document "Catholics and Evangelicals Together," which was endorsed by Michael Novak. The Evangelical side included an endorsement by Pat Robertson and the document was part of a larger *rapprochement* between Catholics and Evangelicals that began with the Gerald Ford administration and the Moral Majority founded by Jerry Falwell.

In his book *One Nation Under God: How Corporate America Invented Christian America* (2015), Princeton historian Kevin Kruse traces the development of the Moral Majority through its precursor, the "under god" movement which began in the 1930's. Although masked as a nondenominational movement of Christians for moral reform against communism, Kruse shows that the big corporate sponsors were not just anti-communist, but rather fervently against the administration of Franklin Roosevelt. This period marks the origins of National Prayer Breakfasts, July first celebrations, and the collusion of Hollywood with Christianity (the Production Code and the production of religious Hollywood films like the Ten Commandments). The movement was successful in getting the phrase "under god" into the Pledge of Allegiance and on the currency. It is important to note that this was a movement against social gospel Christianity and the regulatory New Deal era policies. Its founder James Fife (a graduate from the University of Chicago), traded frequent blows with Reinhold Niebuhr on radio talk shows (Kruse 2015, 79). He promoted a nondenominational religion that tried hard to bring in Catholics and Jews into the movement, but this nondenominationalism mostly held a belief in the "American way of life" and "the free enterprise system." In their popular newsletters and pamphlets mailed out across the country it promoted a politicized religion, attacking progressive taxation as a form of theft that was against the Ten Commandments. The movement was endorsed by Eisenhower, to which Kruse attributes his presidential victory in the 1950s, and the

president mentioned in his inaugural speech that the three great faiths (Christians, Catholics, and Jews) are all saying the same thing: "The American people, like Eisenhower, had become very fervent believers in a very vague religion" (Kruse 2015, 68). These conservative Catholics are part of the lineage of this movement birthed in the shadow of the New Deal, and from the beginning this movement situated itself against the welfare state. It was the counter movement to a progressive Christianity which characterized the progressive era in the United States. Kruse notes that of all the US presidents, FDR uses scripture in his speeches more than any other. American progressive Christianity was replaced by a corporate funded Christianity which took over half a century to become the dominant face of American Christianity.

What these conservative Catholics helped do is align this nondenominational, yet corporate funded Christianity, with Catholic social thought, in the process providing a Catholic defense of American liberal capitalism. And although the social encyclicals retain the anti-capitalist language, it becomes vague enough (like the nondenominational American Christianity) to be read as an endorsement of liberal capitalism: "Neoconservatives strongly identify themselves with all that John Paul II has proposed and do not dissent from papal teaching in any way" (Curran 2002, 248). Neuhaus states that the greatest threat to humanity is not political, economic, or military crises, but the crisis of disbelief; as in *Veritatis splendor* (1993), relativism and lack of faith are the root causes of the world's social problems.¹⁷ And as in *Veritatis splendor*, the chief symptom of this relativism is the idea that Christians can pick and choose for themselves what Church teachings to follow, particularly in regard to the sexual teaching (Hollenbach 2003, 21 and 84).

¹⁷ Its perhaps interesting to remember here Talal Asad's critique of Charles Taylor's *A Secular Age* that I highlighted in chapter 4; that in the entire book Taylor only uses the word "crisis" to talk about the lack of transcendent meaning in modern culture and never about economic, political, or military crises.

In 1981 Canadian Bishop John Sherlock told a group of Catholic university students, "Canadian bishops and, surprisingly, the American bishops are moving to a clear-cut condemnation of capitalism" (John Sherlock quoted in Hanson 1987, 113). Five years later the US bishops would publish their economic pastoral letter *Economic Justice for All*. Yet the Catholic communities of the US and Canada were no longer the working class immigrant communities that characterized the Catholic Church throughout most of the nineteenth and early twentieth centuries. Now part of the middle class birthed in the Keynesian period, this new generation of Catholics helped get Ronald Reagan into office. Part of this newly converted middle-class conservative Catholicism, Michael Novak became famous for his opposition to the bishops economic pastoral letter when he wrote an alternative letter. At the time he was working for the American Enterprise Institute, and Eric Hanson notes that Novak's political and media allies helped give his alternative letter the coverage it needed; enough so, that his position could become just as publicly visible as the bishops:

the ability of the layman Novak to fashion the alternative position to the episcopate is a new phenomenon in American Catholicism. Novak's media connections, especially to national business magazines like *Fortune* are significant in this regard. The biggest difficulty faced by the American bishops is not the drafting and passing of the letter, but the selling of it to an American Catholic population that has made great socioeconomic advances and that has participated in the landslide reelection of Ronald Reagan, principally on economic policies at variance with the basic orientation of the letter (Hanson 1987, 118).

The present situation is almost a reversal of the one Hanson described. The US bishops downplay the tradition of social Catholicism at a time when the economy is listed as the highest priority to Catholic voters, not the "moral" issues with which the bishops have become preoccupied. One reason why Catholic social teaching is called "our best kept secret" is because of the way the hierarchy under-prioritizes it in favor of the sexual (or personal/morality) issues.

Theological ethicist Lisa Sowle Cahill (2012) makes this point again and again. The latest example she gives is in January of 2012 the USCCB website was inundated with press releases outlining the bishops' reaction to the Health and Human Services ruling that Catholic organizations would be required to provide health care that included contraception under the new Affordable Care Act. What bothers Cahill is not the bishops' stance against the ruling, but that not one press release was devoted to poverty awareness, even though January was named poverty awareness month by the USCCB itself.¹⁸ The immense value of Catholic social thought — which includes a stress on social justice, the right to a just wage, solidarity with those who suffer injustice, the rights of workers to organize and join unions, critiques of capitalism (which, even when downplayed are still valuable for mobilizing religious resistance), and subsidiarity (in its older articulation stressing the responsibility of the public authority to intervene in the economy for the sake of the common good) — is obfuscated by the sexual issues. The hierarchy's politically motivated prioritizations justifies someone like a Charles Keating. It is this obfuscation that allows a person like Charles Keating to claim Catholicism and family values when he is actually destroying families with his financial swindling.

It is unclear why John Paul II and Benedict XVI would ally themselves to these American forces, attack popular movements within the Church, risk the Church's monopoly in Latin America, and alienate individual Catholics and divide the Church on personal sexual issues:

¹⁸ Cahill also mentions the USCCB's voting guide *Faithful Citizenship* (2008), which lists Catholic concerns such as war and peace, economic justice, right to life issues, defense of marriage, and health care reform. The 2008 document did not prioritize the list, but the 2012 reissue contained an introduction that did, and mentioned that some of these issues involve "intrinsic evil" while other just raise serious moral concerns. The newly prioritized list is (1) abortion, (2) the effort to force religious ministries to violate their conscience (which has to do with the Health and Human Services ruling), (3) attempts to redefine marriage, (4) the economic crisis, (5) immigration reform, (6) wars and terror.

In practical terms, the question can be put this way: has the Catholic participation in the third wave of democratization been a pragmatic strategy adopted as a means by which the church sought to open social space in closed societies within which it might advance its own religious and ethical agenda? Is there a danger that the church might use its new freedoms in formerly authoritarian polities to impose its own authority whenever doing so might be politically feasible? John Paul's statements that obedience to truth about God and the human person is the precondition of freedom has led some to suspect this (Hollenbach 2003, 129).

Gregory Baum characterizes Ratzinger's strategy as an "excessive application of the logic of maintenance," and his rejection of the Second Vatican Council represents a reversal of the democratization of the Church (Baum 1987, 45). Ratzinger himself recognized, at least as early as 1985, Max Weber's thesis that certain forms of protestantism orient themselves well with capitalism. Archbishop Weakland recalls a speech Ratzinger gave to German industrialists in 1985 in which the Cardinal noted that the free market does not work for the common good on its own and it does not help underdeveloped nations; he cites Theodore Roosevelt saying in 1912 that Latin America will never be assimilated into the United States as long as it remains Catholic, and also cites a 1969 lecture by Rockefeller which recommends replacing all the Catholics in Latin America with other Christians (Weakland 1991, 202-203). Yet in spite of this recognition that the American hegemon seems fundamentally antagonistic to Catholicism, John Paul and Benedict still advocate for reform to the American capitalist system with the promotion of a religious system based on moral values. "Ratzinger does not openly condemn capitalism as intrinsically evil, but he does come close to it in the many questions he raises" (Weakland 1991, 203). But, "Marxism is absolutized as *the* political incarnation of evil, as something whose 'core' is constituted by 'atheism and the negation of the human person, his liberty, and his rights" (Segundo 1985, 151).

While John Paul II ended his reign as pope with a funeral attended by almost all the world's leaders and applauded for being perhaps the most important figure in the fall of communism, Benedict resigned his pontificate mired in scandal and corruption. We are still not sure if it was the cover up of the child sex abuse, his proposed attack against gay clergy, the money laundering scandal at the Vatican Bank, or the overall loss of numbers of Catholics in the West. But what Harvey Cox said in 1988 — that the "Christianity of the twenty-first century will either look more like Boff's, or more like Ratzinger's" — seems to have already been played out (Cox 1988, 77). The Church now has a pope from Latin America who consults Boff on his encyclicals, while Ratzinger is out of the spotlight, retired to an Italian monastery, leaving behind a legacy of scandal and recalcitrance.

8. Conclusion: You Can Say What You Like When They Like What You Say

In this thesis I explored the development of Catholic social teaching in light of world-systems analysis. In highlighting the distinction between radical (socialist), liberal, and conservative, I have shown that such categories are unstable and often shift. Furthermore, what looks like a radical position can be a mask for conservative solutions. This is particularly the case with modern Catholic social teaching. Throughout the textual analysis of the social encyclical tradition we have seen that a constant feature of modern Catholic social teaching is the reiteration of the Marxist critique of capitalism coupled with a conservative reformist call for a "change of heart" or the reform of morals and values in society. This reformist call shifts in each of the three periods but generally stresses (1) the possibility of class cooperation over the reality of class conflict, (2) the right of private property as an ethical good but one that must be coupled with a social obligation to charity, while (3) the concept of charity in the tradition shifts along a spectrum to a simple giving to the poor while at other times it is more akin to the notion of distributive justice¹, and (4) socialism is an attractive threat to the social order and the Church's duty is to steer the workingman away from this temptation. The Church moves towards a "world religions" framework as the interstate system of historical capitalism, with its liberal secular differentiation of spheres, grows toward a world-encompassing scale. Whereas in the past the main issue the social tradition faced was whether or not Catholics could work alongside socialists in the advancement of economic and political justice, the move towards a world

¹The original title I had in mind for the thesis was "From Economic Justice to Charity," a title meant to stress that the changes to the tradition brought about by John Paul II and Benedict XVI were tantamount to the watering down of the tradition into an NGO style charity model, versus the more radical calls for political change linked to the economic system which was called for in the earlier tradition. Once I began the research into Catholic social thought I realized that these two concepts are much more varied than the meanings we commonly ascribe to them. Charity encompasses justice and stresses "love," which in the later encyclicals (*Caritas in Veritate* for instance) forces upon society a certain spirit of the democratic intuition of equality. While the critiques against elites performing charity as a replacement for just economic structures that *Quadragesimo anno* highlights, is written in the context of a Church that was threatening the excommunication of Italian Catholics who worked alongside the Italian Communist Party.

religions model and the acceptance of the Church's "religious" role in the differentiated social sector (or private sphere advocating moral reform) moves the dialogue partners to other religions, religions that have also undergone this functional differentiation.

Part Two developed the history of historical capitalism and the birth of the state through the lens of world-systems theory, emphasizing the complex dynamic involved in the establishment of the interstate system of weak states that must compete with each other for capital's transnational flows. Although in the post-Cold War era we now call this globalization, it is more akin to "denationalization" of national state interests. Socialists seized state power and redirected the state towards redistributive policies. In response, Western capitalist states also shifted their priorities to defuse the threat of socialism, developing the democratic welfare state. The liberal state, originally conceived as a vehicle of capitalist class power — restricting the voting franchise and implementing tax policies that forced urbanization and proletarianization — was eventually remodelled through two centuries of antisystemic struggles which saw the widening of the voting franchise and the re-characterization of the state as a presumed agent of redress and redistribution.²

The social encyclical tradition of the twentieth century participated in these developments first by stubbornly refusing the changes to the social order and harkening back to a Catholic "golden age" of patrimonial feudalism (expressed by third-way corporatism), then by a progressive opening up to liberalism's freedoms (personal and political rights) and the

² Hauke Brunkhorst (2011) notes that constitutional democracy solved the three problems associated with modern capitalism and functionally differentiated societies. These problems are (1) the religious civil wars that the seventeenth and eighteenth century monarchies and twentieth century dictatorships could only suppress, (2) the constitutional struggles over public autonomy (versus administrative power), and (3) the class struggle. He states that the advance of egalitarian mass democracy transformed the fight over public autonomy into a "permanent and legal revolution" (Brunkhorst 2011, 156). This permanent legal revolution allowed both market capitalism and a legal system that constrained some of the negative external effects of markets to coexist. It also developed the balance between freedom of religion and freedom from religion. I will touch on these insights further in the next sections.

advancement of democracy (even within the Church), and finally by a conservative defense of American liberalism (religious freedom to act the Church's new role in a new conception of civil society after the fall of communism). The shift to the American hegemon in the world-system advanced a liberalism that was more favorable to religion than the previous anti-clerical continental variety. The second phase of Catholic social thought recognized this and saw a progressive shift toward religious freedom versus national Catholic establishment and began the Church's now famous advocacy of human rights. The third phase, however, continues the shift towards American liberal "economic rights" (the right to economic initiative in *Sollicitudo rei socialis* and the endorsement of the free market in *Centesimus annus*) and begins to use religious freedom as a way to advance Catholic moral norms in the political sector, for political purposes. This acquiescence to the liberalism of the American hegemon is also the acquiescence of the Church to being placed within the liberal differentiated religio-moral private sphere. But these private issues have political and economic consequences. The Church downplays its older commitments to social justice and instead becomes a reactionary force in political society with its preoccupation with abortion, gay marriage, and its own freedom to advance these "private" moral issues on the political stage.

This conclusion will bring together the three parts of the thesis by looking at the way the Church has responded to what world-systems analysis has named the two waves of antisystemic movements. I argue that the recent preoccupation with "personal morality" is actually a political and economic ideological battle against the second wave of antisystemic forces. Furthermore, the Church's reaction to this second wave exactly mirrors its response to the first wave — the urban and labour unrest that was a feature of nineteenth century industrial capitalism. The phrase "culture war" obfuscates the economic and political dimensions of this struggle.

I then move on to Naomi Goldenberg's concept of religions as vestigial states; past sovereignties that are allowed to exist in attenuated form within the liberal nation-state. The "world religions" discourse disciplines and privatizes these past forms of (now colonized) structures, erasing alternative social arrangements and economies. The history and development of Catholic social thought is the history of a vestigial state in the making. Vestigial state theory brings together the scholarship of "critical religion" with the scholarship around the liberal secular differentiation of spheres and provides a framework for understanding the transformation of religion within the world-system of historical capitalism and the birth of the interstate system.

8.1 Catholic Social Thought as a Response to Antisystemic Movements: A Repeated Conservative Pattern in the World-System

As the Church moves towards the defense of liberal human rights — namely religious freedom in Vatican II's *Dignitatis humanae*, the right to "economic initiative" in *Sollicitudo rei socialis*, and an endorsement of the free market in *Centesimus annus* — a focus on gays and feminists enters into the teaching with the attack on gay rights and legal abortion. While older social encyclicals understood that liberal capitalism and its resulting rapid urbanization leads to unstable families and "imperils human morality" (*Quadragesimo anno* n.135), the social teaching of John Paul II instead sees the "moral/cultural issues" as the main threat to society and he significantly alters the traditional critique of capitalism by way of a global focus.³ "The sexual question" has been cast in Catholic social teaching as a problem of runaway human rights linked to the decadence of the global north: what *Caritas in veritate* refers to as "a right to excess" (n.43). A North/South binary is established which downplays the structural components of

³ To be fair Benedict XVI in *Caritas in veritate* n. 25 does mention economic reasons for why young people are unable to "forge coherent life plans."

capitalism, shifting the focus to personal morality and casting the people of the global north as decadent consumers claiming rights to which no one is entitled.

As we have seen with world-systems analysis, liberal capitalism produces race, class, and gender social conflict through its program of economic restructuring, then ideologically recasts these conflicts as past tribalisms and traditionalisms that the project of liberalism itself will solve. Immanuel Wallerstein identifies a "second wave of global antisystemic movements" emerging in the 1960's. These include the race, gender, sexual, and environmental rights struggles in the capitalist world (or the "core countries" of the developed world), and the fight for political rights in the communist world (the "semi-peripheral countries" in what used to be called the second world). The papacy's response to this second wave of antisystemic movements is a repeat of its reaction to the first wave (the socialist and worker uprisings in the nineteenth century). There is a larger dynamic at work here than recalcitrant religious misogyny and homophobia in the Church. Instead, liberal economic development produces a conservative incitement against feminists and gays that the Church reproduces and to which it gives a public articulation. Reproductive rights, anti-discrimination laws, and marriage equality are not only about individual freedoms played out in liberalism's politics, but are legal strategies of survival within the constantly restructuring social relations brought about by capitalism's ceaseless unfolding.

Instead of seeing the inherent change that capitalism produces and the emergence of status-group resistance as symptoms of capitalism's social rearrangements, something that older social encyclicals did indeed recognize, the Church hierarchy during this conservative period resists the demands these groups make on the system. The social encyclicals of this period do occasionally attack capitalism when it is named as such; but for the most part, as shown in the

shift towards a focus on personal morality in the tradition, they minimally attack greed, consumerism, and the like; and oftentimes project this decadence onto the lower status-groups themselves. This is a main characteristic of the Catholic social tradition as developed in the papacies of John Paul II and Benedict XVI.

With the example of gays we see that although homosexuality has always existed, an urban movement based on changing social structures necessitated a struggle to wrestle certain securities and protections from capitalism: the homosexual of the past becomes the LGBT political subject in the 1960s. These securities mostly centered around job security and safety from physical attacks, as homosexuals as a group became political and cultural targets in the Cold War period. We can also argue that the present increasing necessity of dual income households in capitalism's neoliberal phase contributes to the drive for marriage equality. Throughout these struggles conservative institutions, most often in their guise as religions, have sought to limit such freedoms, attacking gays and lesbians for altering society, while ignoring capitalism as the historical agent that unleashes such change, rearranging structures and identities. The status-groups that organized in the second wave of antisystemic movements fight for rights in order to better survive under the rearranged structures of society. In this way capitalism is a larger threat to the family than any radical queer group, but minorities are easily blamed in the chaos of constantly shifting social arrangements.

In the struggle for women's rights and the birth of feminism, shifting relations of production, proletarianization, and urbanization force a greater need for family planning and access to abortion as a means of survival under capitalist socio-economic pressures. And once again, conservative ideological paradigms cast these survival mechanisms as the cause of social problems, redirecting blame away from capitalism's revolutionary changes and obfuscating such

changes by labelling feminists (and feminist ideology) as the primary agent of social disintegration.

In a lesser way, John Paul II and Benedict XVI also attack environmentalists for placing creation above the divinity of the human person which they claim leads to a type of "neo-paganism" (*Caritas in veritate* n.48), even though the two popes were applauded in certain sectors for taking environmental concerns seriously. This seems to be a basic strategy: they recognize the importance of protecting the environment, yet attack environmentalists; they advocate the importance of protecting human rights (even women's rights), yet are against feminism; they claim to advance the dignity of the human person (even LGBT persons), yet attack anti-discrimination legislation. This reaction to the second wave of antisystemic movements mirrors the Church's response to the first wave of antisystemic movements; claiming to be for the rights of labor and against the excesses of liberal capitalism, the papacy nonetheless built its own justification for the right of private property and attacked socialism for stressing class divisions and creating class conflict: in other words, those who fight and speak out against problems are the problem.

The Church maintains its legitimacy in civil society by recognizing the problems (capitalist greed and urbanization, environmental destruction, gender-based discrimination,⁴ and

⁴ The social encyclical tradition since *Rerum novarum* recognized women's economic rights and rights to work; or rather, *Rerum novarum* and *Quadragesimo anno* recognized the reality that women were working in industrial settings and argued for their right to decent working conditions while stating their right to act their "proper role" in the household. The other social encyclicals since John XXIII talked about women's rights to work outside the household, while John Paul II reiterates this right, he couples it with the view of the importance of women in the home through a framework of gender complementarity. In the progressive period the rights of women to a career are seen as a part of the "signs of the times" outlined in *Gaudium et spes* and the emerging consciousness of human rights and human dignity, John Paul II in his apostolic letter *Familiaris consortio* (1980) begins to reverse this (Gellott 1994, 288; see also Cahill 2005).

even violence directed against LGBT peoples⁵), but blame these marginalized groups who organize and step out of line with the statusquo (socialists, feminists, environmentalists and LGBT human rights groups), and attack their attempts to have their survival mechanisms legally recognized or implemented (progressive taxation, abortion and contraception, environmental protection, and anti-discrimination laws and gay marriage). Economic exploitation, gender-based discrimination, violence directed against LGBT peoples, and environmental destruction are a reality recognized by the hierarchy; but socialism, abortion and feminist ideology, homosexual acts, and "neo-paganism" (defined as placing the protection of the earth above the "right to development") are "intrinsically evil."

In this historical unfolding patrimonialism re-emerges; discrimination against gays and lesbians is bad since all persons deserve to have their human dignity respected, but anti-discrimination laws are not only unnecessary, they will promote morally disordered (and intrinsically evil) lifestyles. Environmental destruction is bad, but the solution is a change of heart that will be brought about by cultivating a universal prolife ethic, not through the state's ability to enact environmental protections. Ratzinger attributes the decline of women religious to radical feminism in the cloisters and states that an increase in Marian devotion will lead to a societal respect for women. In other words, the safety that these groups seek must come through the benevolence of the majority, cultivated through religion and personal morality. As with the working class in the early period of the social encyclical tradition — when the Church advocated in a patrimonial spirit that workers and bosses/owners of capital can come together — this

⁵ The CDF's *Letter to the Bishops of the Catholic Church on the Pastoral Care of Homosexual Persons* (1986) and the American Bishops' pastoral letter *Always Our Children* (1997) open with discussions on the reality of discrimination against gays and lesbians.

recourse to patrimonial benevolence, and "love the sinner/hate the sin" mentality, masks the reality of how power operates in society.

This lack of a recognition of the reality of conflict, as well as a need for a theory of power relations in the tradition, is one of the weaknesses of Catholic social thought that most of the scholars of the social encyclical tradition recognize (Curran 2002, 88; Curran, Himes, and Shannon 2005, 427). However, the appeal to a social change of heart corresponds to the process of liberal secular differentiation of spheres that the Church, especially in the last period I examined, has accepted. Indeed, the first two periods I examined showed that the social encyclical tradition formulated strong alternatives for the economy in order to protect workers and the poor and for the enforcement of human rights. Yet, as liberalism unfolds within the Catholic tradition itself, the Church partially accepts the separation of the public and private spheres and its own role being cordoned off into the private sphere. In this way the focus on sexual issues and personal morality is an effect of liberalism on religion, while the Church's main engagement in the public sphere (political society and civil society) devolves into a reactionary stance against groups calling for change. Both sexuality and religion, in being situated in the private sphere, enact the "culture war" scenario which fundamentally obfuscates the political and economic consequences of changing family structures (and stresses on families) that capitalism produces.

There is a double standard present in the way the natural law tradition is applied to capitalism and greed versus the sexual issues framed in terms of personal morality. From Pius XI's *Quadragesimo anno* (1931) and *Casti connubii* (1930), to Paul VI's *Populorum progressio* (1967) and *Humanae vitae* (1968), right through to John Paul II's social encyclicals (1981, 1987 and 1991) and *Veritatis splendor* (1993), natural law arguments are kept general and are

eventually scrapped altogether from the social tradition, but kept strong and unwavering on sexual morality (Curran 2002, 65; Gudorf 2005, 327; see also Pope 2005). "Morally disordered acts" are never justifiable in the moral encyclicals, but greed is never conceptualized as such; or rather, it is hard to judge greed when it is backed by a theologically grounded general right of private property.

The natural law tradition holds that certain exceptions are justified based on context, yet in regard to the sexual issues, contextual variables are never articulated or developed: thus sexual ethics as defined by the hierarchy are at all times, and for every person, applicable.⁶ But it seems to me that living with capitalism's revolutionary social changes precisely constitutes a contextual variable by which alternative "lifestyles" and family planning could be seen as justified for Catholic natural law arguments. Gudorf notes that in the social tradition (specifically *Dignitatis humanae*) an historical hermeneutic is employed that justifies change in the tradition, but this is absent in the treatment on family and sexuality. Yet, as Curran notes, "Specific moral norms by their very nature admit of exceptions because of the influence of individual circumstances" (Curran 2002, 96). Liberal capitalism, perhaps more so than political and philosophical liberalism, has historically changed the family and sexuality. These changes represent the contextual variables that make alternatives necessary.

The silence over these variables is political because it serves to ignore the destructive effects that liberal capitalism has had on families. It also (perhaps inadvertently) scapegoats feminism and homosexuality as the cause of the traditional breakdown of the family, while

⁶ What Curran calls the best of Catholic moral teaching, since Aquinas, insists that moral norms are intrinsic, they come from the human person and from the human experience of what is good; not extrinsic, that is, coming from outside the person in the form of leaders and authorities. Aquinas holds that moral pronouncements are good not simply because they come from legislators: "something is commanded because it is good, not the other way around" (Curran 2002, 130).

feminists and LGBT peoples are fighting for just legal structures that make living under capitalism more bearable for not only marginalized persons, but also families more generally. By placing personal sexual issues before the structural effects of capitalism, the Church produces an impossible sexual ethics that actually serves to undermine its own authority, as the majority of Catholics do not even (or rather cannot even) follow these teachings, and instead appeal to their own consciences in the areas of contraception and family planning. Curran (2002), Cahill (2012), and Casanova (1994) state that the Catholic laity's response to the hierarchy's normative sexual ethics shows that the faithful have internalized the teachings of Vatican II, particularly the freedom of the believer's conscience and the Church as the people of God:

Implicitly at least, Catholics are saying that they are the people of God, that the church also belongs to them, not only to the hierarchy, that, irrespective of what the hierarchy says, they will not feel excommunicated from their church, that they also have a right to participate in the interpretation of the meaning of the Catholic normative tradition for contemporary circumstances, and that ultimately they individually have the moral obligation to apply in conscience Catholic normative principles to their own individual situations (Casanova 1994, 206; see also Curran 1987, 277).

David Hollenbach, on the other hand, shows a different reading of the laity's interpretation of the sexual teaching. He conditionally agrees with John Finnis who states that *Veritatis splendor* is not primarily about sexual ethics but about faith, and that this faith is countercultural and forces the believer to accept that God, not themselves, is in charge of the universe. Hollenbach adds again the element of historical consciousness to his intersection of sexual and social ethics and positively notes, along with Avery Dulles, that the Christian is a person on their way to discovery, in pilgrimage, of a disclosure that will "fully satisfy the yearning of the human spirit" in an asymptotic reality which moves closer to a fulfilled revelation meant for the end of time (Hollenbach 2003, 34). Thus, along with Casanova, Hollenbach sees such discernment among

Catholics as a sign of maturity: what Casanova calls an advanced "moral reflexivity" (Casanova 1994, 206). But, as I showed with the *Ratzinger Report* in the previous section, John Paul II and Benedict XVI see this mature ethical reflexivity as a sign of relativism and a willfully disobedient laity that needs to be brought back in line with the magisterium; furthermore, in their view, this relativism was the unfortunate consequence of Vatican II. Thus, the sexual teaching and the laity's (lack of) compliance is really about power/control and authority. This was first argued by Hans Küng's 1971 critique of *Humanae vitae* (Küng 2013, 165).

Casanova defines what he names as the "semantic," "performative," and "procedural inconsistencies" in the hierarchy's stance on war and the economy compared to its stance on abortion. First, in *The Challenge of Peace* (1983) the US bishops for the first time applied Catholic "just war" theory to US foreign policy and the threat of nuclear war. Yet even though war is killing, it is sometimes (albeit with very stringent criteria under Catholic "just war" theory) regrettably necessary; however, there are no "just abortions," even though research shows that most Americans believe that "under certain conditions" abortions are justified (such as if the mother's life is in danger) (Casanova 1994, 193). Secondly, the performative inconsistencies become apparent when we see how the war and economic statements are presented as mere "policy recommendations" and that the bishops are in no way claiming to be "experts,"⁷ while "In the case of abortion, by contrast, the church seeks to translate immediately its normative recommendations into law" (Casanova 1994, 196). Finally, the procedural inconsistencies are shown in the way that when producing statements on war and the economy the US bishops (and the Vatican) undergo long consultations with economists and other experts;

⁷ As I showed in Part Three these positions have become a general part of the social encyclical tradition as a whole, in spite of the strongly worded language and condemnations of certain practices of liberal capitalism.

when it comes to abortion, women are ignored and the statements come "handed down from above" (Casanova 1994, 201).

The second wave of antisystemic movements represents not so much a fundamental challenge to capitalism, but rather a call to legal protections that ensure the possibility of living safely and sustainably within capitalism's "creative destruction." As I noted with Brunkhorst's work, the permanent legal revolution which characterizes constitutional democracy allows protections which help cordon off the damaging effects of capitalism. In this second wave of antisystemic movements environmentalism seeks to restrain the profit motive in accordance with a somewhat secularized concept of the common good (or rather, public good). Feminism, anti-racist struggles and non-discrimination against gays and lesbians set up an egalitarian criterion which seeks to ensure that markets, and labour markets specifically, function with juridical equality. And the right to access contraception (and abortion) and the struggle for marriage equality seeks to make it easier to achieve a family within the external limits that capitalism imposes on couples. Ironically, we can see that the call and methods of these groups precisely constitutes the appeal for "juridical structures" that ensure justice in a market economy, which was one of the main qualifications of *Centesimus annus*'s endorsement of the free market.

In calling for the state to provide just structures to the market economy, but then attacking the groups organized around this effort, John Paul II's and Benedict XVI's commitment to economic justice can be called into question. Furthermore, in accepting religion's functionally differentiated role of the personal moral sphere, and using this role to scapegoat sexual minorities and feminists, they have enacted a political dynamic which uses religion's public voice in civil society to attack groups challenging unjust structures. This is most clearly seen in the hierarchy's attack on the work of women religious, a tactic of questioning their orthodoxy in

the personal moral sphere (the sexual teaching), to silence their social justice advocacy. In the Latin American context in the third period I examined, this attacking of social justice work was carried out not through recourse to obedience to the sexual teaching, but merely by stating that theological currents in Latin America were unduly "politicizing religion" (Levine and Stoll 1997, 81).

In aligning itself with Washington in the pursuit of the containment of communism, what Casanova calls the "Washington-Rome alliance," the Vatican converged with American liberalism and a new global capitalist power. No longer the counterculture to the "North Atlantic Protestant capitalist system" which the older immigrant Catholicism and anti-liberal continental Catholicism represented, this new Catholicism not only opened itself up to the modern world but opened itself up to liberal capitalism (Casanova 1997, 133). The "de-politicization" of Catholic social thought — which sees Catholic social thought not as a political or economic alternative but merely a tool to guide the Christian in moral life — ultimately means that the older radical critique of capitalism is replaced by a conservative critique of a culture of consumerism and excess in which the onus of societal disintegration is easily placed on marginalized groups. *The Challenge of Peace* and *Economic Justice for All* were written to criticize the two pillars of the Reagan presidency, the nuclear arms race and reaganomics; twenty years later, after the slow replacement of the US episcopacy with conservative bishops, the US bishops did not even condemn the Iraq War and only come into the public sphere "on those public moral issues on which it is in agreement with the Protestant fundamentalists" (Casanova 2011, 271).

In this re-emergent conservatism the hierarchy no longer seeks social, political, or economic alternatives — the recent social encyclical tradition constantly disavows its older third-way commitments — and it thus supports liberal capitalism's global status quo in the American

hegemonic period. Furthermore, the hierarchy uses its "de-politicized" voice on personal moral and sexual issues to attack those groups who are challenging the status quo. This dynamic easily lends itself to a conservative defense of American capitalist power; and in aligning itself with American capitalist interests, the Church wrestles some power and influence out of the new situation: as a global player within a new model of liberalism that highlights the importance of religion in the international civil society. To expand on this dynamic further, I conclude with Naomi Goldenberg's vestigial state theory of religion.

8.2. Once and Future: The New Opportunities Global Society Affords the Church

According to Peter Beyer, modernity functionally differentiates religion to its own system in the same way that it differentiates the political, economic, and scientific systems (Beyer 2006, 5). Globalization is the spreading of this functional differentiation to a world-scale similar to the way that world-systems theorists hold that globalization is the spreading of the interstate system of historical capitalism (Beyer 2006, 42). The Catholic Church plays a major role in this history, as the medieval synthesis is broken down in the birth of market capitalism, the liberal nation-state, and educational institutions:

The breakup of the medieval hegemony of the Catholic Church in Western Europe was, to put the matter very briefly, symptomatic of a shift in this society toward the dominance of technically oriented institutional social systems differentiated according to function, most importantly the rise of the political system of sovereign states, the capitalist economic system, and the modern scientific system (Beyer 2001, 128).

The Church doesn't become the institution of this functional differentiation, but rather religion itself, and Beyer cites what has become known as the "critical religion" scholarship on the reproduction of the religious system in the colonial era. That is, missionaries, colonists, explorers, and scholars begin to "see" other religions in the areas that they infiltrate. This is not

just a Christian bias, but a modern bias that assumes that religion is "differentiable, systematic, and plural" (Beyer 2001, 129).

Although morality is not a form of system communication monopolized by the religious system, it is often a part of what is attributed to the functioning of the religious system. As Beyer holds, morality in a way informs all the societal subsystems (it is not its own system), but like the nation is to the state, morality can (and is often) attributed to the communication of the religious system.

As the political system reproduces itself in the form of territorially delimited states, so the religious system reproduces itself through other religions. This "internal strategy of segmentary differentiation" that characterizes the political and religious systems differs from the economic system which is the only system which can be truly called global (Beyer 2001, 146). Yet, the religious system can be seen to be more akin to the economic in that it is somewhat deterritorialized; it does not necessarily rely on the territory and location in the same manner as the political system.

We can also see religions as types of nations without states, or ethno-nationalisms (Beyer 2001, 145). This is precisely the basis of Goldenberg's insight about religions as vestigial states, and this she also defines as "once and future states" in that they are forms of colonized past sovereignties that exist in a "no longer-not yet" state: they desire a return to a power they once had sometimes historically but oftentimes mythologically. Although the hierarchy generally disavows this desire — it long denounced its social teaching as a third-way or a real alternative to socialism or capitalism — it has benefited from the emergence of global society, or the deterritorialization of the function systems towards an international civil society; and the Church

uses this new power to influence what is often seen as the moral communication of society, which of course partially spills over into the political, scientific, and economic. As Brunkhorst notes, the globalization of the religious system disembeds religions from states in the same way that the "state-embedded markets" are replaced by the "market-embedded states." To Casanova this is a shift from the nation-state to civil society (1997, 137-138), which encompasses other function systems beyond the nation-state.

Brunkhorst further states that although the sphere of global systems is completely secularized with "rational power politics, positive law, experimental science, academic professions, autonomous art, instrumental economy and technique, a secularized global human rights culture, global mass culture and a global semantics of political and economic progress," it also contains an autonomous sphere of religious values within "the modern functionally specialized, hence secular society" (2011, 157-158). He stresses, however, that the globalization of the religious system was aided by "in particular the strong impact of fundamentalist movements on all modern religions" (Brunkhorst 2011, 158). Citing Casanova and Gilles Kepel, Hollenbach states that the process of functional differentiation also puts pressure on religions to privatize and leads to a rise in fundamentalism: "The pressure to treat religion as a purely private affair may thus be a source of, rather than a cure for, the emergence of fundamentalist religion as a political force. If fundamentalism is normatively objectionable, as I hold it to be, normative recommendations that religion be kept private will be counterproductive" (Hollenbach 2003, 185).

Vásquez and Marquardt (2003) argue that John Paul II's "postmodernism" is reflected in the way that he both criticizes globalization and global media culture — criticizing the "culture of death" and formulating a conservative attack on a decadent culture of consumerism — while

using global communication systems and media to advance his own image internationally in this new post-national world order. They begin their chapter on John Paul II by citing Casanova (1997), who outlines the new space afforded to the Church in newly globalizing civil society. The Church's claims to universality were always in contestation with the territorial affinities of the liberal nation-state (Vásquez and Marquardt 2003, 180). With globalization the Church can reassert these claims — and papal moral encyclicals begin to show this universality in that they are no longer just addressed to Catholics — and John Paul II becomes perhaps the largest voice for human rights coming out of the religious function system; a new version of the "first among equals" in the world religions model, where religious leaders join their voices in response to certain global issues in a spirit of interreligious dialogue (i.e. world peace and human rights).

Yet scarred with the taint of fundamentalist drives, the globalized religious function system provides no stringent critique of capitalism and even challenges the progressive evolution of the liberal nation-state (what Brunkhorst called the permanent legal revolution towards inclusion). Thus, colonized subjects claiming religion as a placeholder for older ethno-nationalisms are reoriented away from challenging globalization and find their identities and morality in religious systems as one part in the whole of globalized social systems: "Thus are these systems intrusive; it is a key aspect of their global spread" (Beyer 2006, 47).

The "enabling violation" of colonialism produced national liberation movements, but "national liberation was not a revolution" (Spivak 2012a). Indeed, it brought past colonized territories and peoples into the modern liberal interstate system with the illusion of subjective choice and sovereignty. In a similar vein, global religions now bring disparate peoples into post-territorial globalization. In this process religion both modernizes and disciplines "neocolonized" subjects. The pope shepherds an increasingly globalized flock, in terms of new global

communication networks which are both deterritorialized yet centralized, and reorients their desire away from religious calls for social justice (what the hierarchy condemned as "politicized religion") and toward a social reform of personal morality — the conservative moral critique of consumerism (not capitalism), the culture of death, and a right to excess. This moral critique represents a social engagement with political and economic consequences waged through a New Evangelization which ignores the older call in *Evangelii nuntiandi* for an evangelization focussed on global economic and political justice.

The politicization of personal morality, which is one aspect of the communication in which the religious function system of global society engages in, (inadvertently) transforms the religious system into a reactionary force against those groups still challenging structures of injustice and exclusion in globalizing social systems. In this way the Church can say what it likes, because global liberal capitalism (in a way) likes what it says; and the Washington-Rome alliance which saw the end of the communist and socialist threat has given the Catholic Church a privileged space in post-Cold War world governance models. These models stress the importance of (international) civil society over the older forms of state-centered development and social services.

For over thirty years (an entire generation) — from the CELAM conference at Puebla to the attack on American religious sisters — a centralized hierarchy in the papacies of John Paul II and Benedict XVI have redirected the Church away from its challenge to globalization, which in older social encyclicals like *Mater et Magistra* was identified as "neocolonialism." This reorientation is a move towards a conservative defense of the model of the American liberal hegemon.

8.3. A Vestigial State in the World-System: Prospects for Progress

Progressive Catholics who see in the older social encyclical tradition a defense of the state as the guarantor of the common good, or as the sum total of all human community (i.e. the natural development and telos of human relationality as it is identified in the natural law tradition), also fail to note the repressive origins of the interstate setup within historical capitalism. This is William Cavanaugh's main critique in his 2011 work *Migrations of the Holy*. Cavanaugh states:

This conclusion [that the State is the natural form of the agency of society which protects the common good] is based on a series of assumptions of fact: that the state is natural and primordial; that society gives rise to the state and not vice versa; and that the state is one limited part of society. These assumptions of fact, however, are often made without any attempt to present historical evidence on their behalf (Cavanaugh 2011, 8).

In chapter 3 I present the world-systems theory account of the birth of the state alongside Saskia Sassen's work. Cavanaugh echoes this history with a particular focus on the way the state is birthed by violently subsuming within itself all mediating social structures, older forms of civil society, and local community. That is, the state in no way sought to pursue the common good, but rather set into motion modern bureaucratization which at first only benefited the royal households and propertied classes. As I mentioned in Part Two, the State aided proletarianization and urbanization through modern taxation and set up a legal regime that protected property (capital) and bosses/land owners at the expense of workers and farmers.⁸ Cavanaugh cites Charles Tilly and Gabriel Ardent to highlight the war making development of the state (both against other states and against the recalcitrant population opposing modern taxation). The history of popular resistance to the rise of the state undercuts the liberal narrative

⁸ Recall that early labour contracts in England and the US were enforced with harsh and punitive punishments for workers who broke the contract, but rarely if ever enforced the owners obligations.

of the teleologically progressive evolution of the liberal state and its relation to liberal capitalism.

The language of rights posits a progressive unfolding of the liberal State but

the state either absorbed rights previously resident in other bodies (guilds, manors, provinces, estates) or eliminated them altogether, as in the enclosure of common lands. Close analysis of the history of taxation, policing, and food supply indicate that popular resistance to state-building was deep, broadly based, frequent, and violent... Tilly says: 'The state-makers only imposed their wills on the populace through centuries of ruthless effort.' However, we should underscore the fact that state-making was not the motivating intention of state-making elites. The state was largely an unintended byproduct of these elites' pursuit of their own ends (Cavanaugh 2011, 15-16).

To John Courtney Murray, the liberal state frees civil society by limiting the state and allowing the various intermediary associations (civil society) the freedom to pursue the common good. In this view the liberal state makes the common good possible, but is not necessarily responsible itself for the common good. Yet to Cavanaugh this view is also profoundly ahistorical and naive. Civil society has not fared well under the state; indeed, the history of the rise of the nation-state is precisely the history of the "atrophying" of the intermediary associations that make up the civil society (Cavanaugh 2011, 25). In line with Robert Nisbet, Robert Bellah, Robert Putnam and many others, Cavanaugh notes the "progressive enervation" of intermediary associations: "the church, Unions, and the family still exist, but they are expected to convey identities, virtues, and common ends in a context in which their relationship to production, mutual aid, education, and welfare have been absorbed into the state and the market" (Cavanaugh 2011, 29). The state is not local government writ large, but enforcement of centralized authority over and above local associational structures that in the past were stronger than centralization and carried within themselves "rights, honors, immunities, and responsibilities" (Cavanaugh 2011, 26).

When *Rerum novarum* and *Quadragesimo anno* lamented the collapse of the medieval synthesis, it was not merely nostalgia for a Catholic golden age, but was rather the advocacy for complex space (the intermediary space between individual and state) to be rebuilt in the social order. Without the workingmen's guilds the individual worker has been left isolated and defenceless: "the source of injustice is the modern creation of simple space, the individual cut loose from community and left isolated" (Cavanaugh 2011, 43). As John Coleman states:

These popes [the anti-liberal popes of the nineteenth century] spoke a loud no to an excessive individualism which broke up a larger solidarity; a decided no to schemes to privatize religion and keep it entirely within the sacristy; no to an espousal of a liberty of rights that allowed no clear corresponding duties; a resounding no to positivism in law and political science and economics, which would divorce the economy and polity (as impersonal and technocratic mechanisms) from moral scrutiny and human measure; a strong no to a theory of civil rights that thought economic rights, in Jeremy Bentham's terms, were 'nonsense on stilts' (Coleman 1991a, 3).

In the progressive period of Catholic social thought the encyclical tradition moves to a (partial) reliance on the state as the guarantor of not only political rights, but also of socioeconomic rights. Yet in this process the tradition gives up the Church's potential to be, itself, an alternative social structure ensuring the common good: to promote the creation of complex space for alternative economies and authorities. The social encyclical tradition and the works of national bishops conferences produce "policy recommendations" and maintain that they are not experts in politics or economics. To Cavanaugh a first step is for the Church to reclaim its authority to judge if Christians can kill and condemn war, reclaiming that power from the nation-state. Without this basic first step the Church will continue its "withering" and become one more "intermediary association" "whose moral reasoning and moral formation are increasingly colonized by the nation-state and the market" (Cavanaugh 2011, 45). And as I

showed in the last section, a part of this colonization of moral reasoning is the political preoccupation with attacking dissident groups under the guise of combating immorality.

What counts as religion in global society corresponds to the construction of the religious function system in the context of the modernization, liberalism, and capitalist globalization. Religions are disciplined into the intermediary structures of civil society through the process which corresponds to the rise of the nation-state, and while the other function systems become concerned with "this-worldly" affairs, religion is cordoned off to the transcendent (Beyer 2001, 143). That is, the alternative social arrangements that religions as vestigial states once embodied — the past social forms not allowed to exist within the hegemonic nation-state model of historical capitalism — become obfuscated and discredited by consigning religion to the spiritual other-worldly realm which emphasizes personal morality, with the preoccupation of personal morality utilized to serve capitalist interests. This process has also been identified as the "protestanization" of world religions; and as globalization proceeds, these disciplined vestigial states become the criteria of what counts as religion: "what counts as religion in global society is determined more by the set of religions that we end up recognizing as such... they [religions] also conform to a global model of religion that consists in the set of accepted religions" (Beyer 2001, 142-143). The history of modern Catholic social thought is precisely a history of this conforming to a global/world religion (a vestigial state), disciplined by liberalism into attacking those that challenge the structural injustices of capitalism.

John Paul II won a privileged space for the Catholic Church in the newly emerging international civil society of the post-Cold War period by aligning the Church to the American liberal model, helping in the collapse of communism and really existing socialism, and centralizing and disciplining the Church along the lines of the religious differentiated function

system. Francis' changing direction could signal a new moral authority, using this space to affect substantive social change globally. Whether or not liberal capitalism will allow this remains to be seen. As the experience of Latin America shows, religious freedom is not enough of a right to safeguard justice oriented religious priests, brothers, and sisters from being killed and targeted by neoliberal governments. Ultimately, when there are billions to be made, the voices of religious leaders are not going to be allowed to stand in the way.

An entire generation of Catholics have now grown up with a Church geared towards the culture war and a reversal of Vatican II. Reorienting the trajectory of the Church away from a conservative defense of American liberal hegemony towards social and economic justice — or in Cavanaugh's ideal of the Church as a robust real alternative to a state-enabled capitalist economy — will not be an easy task. For all the popularity of Francis' changing direction there is a recalcitrant Catholic sector who are not easily accepting this change (or the loss of the hierarchy's favor).

I would like to close this thesis with an anecdote that highlights the tension between social justice and personal morality, not as a battle fought in political society, but rather be viewed as a struggle within the Church itself. On May 11, a day before the national March For Life here in Ottawa, I was buying cigarettes with a friend who does not pass for straight. A man came in with his young son and as I turned around to leave I noticed he had approached us, put his hands on our shoulders, and said "just to let you boys know, Jesus is coming back and he forgives." Although my friend and I have never engaged together in "homosexual acts" and we are not a couple (he shouldn't have assumed we were), and although the crucifix I wear should have signalled to him that I was already a Christian, these factors were not enough to stop this man from accosting two strangers in a store. I'm also a Catholic who works on my local parish's

Development and Peace committee, and sits on the board of directors for a community addictions support organization. But to this man, all that he feels he has to do to be a good Catholic is to judge gays and not have an abortion. This attitude echoes Charles Keating, who believed that the biggest social threat (or sin) was other people's lives, and hence was able to justify his own socially destructive excesses. When the US Catholic hierarchy states, as it did in the 2012 re-issue of *Faithful Citizens*, that abortion and homosexuality represent "intrinsic evils," while "the economy" (read: systemic greed and wealth inequality) and "war and terror" (last on their prioritized list) merely represent issues that are "morally questionable," people like Charles Keating and the stranger at the store are not challenged on what it means for them to be Christian.

Of course with voluntary associations, you can always leave, or what Mary Daly referred to as "voting with our feet" and walking out. Indeed, there is only so much bullying someone can take before they do. But ultimately what David Hollenbach said about the solution to fundamentalist religion as not privatization, but public engagement, means that the struggle for justice will have to start within the voluntary associations themselves, and the churches that comprise the civil society. Right before John Paul II came on the scene the bishops realized this in *Justitia in mundo*: that an institution that calls for global justice must itself be just and democratic. In returning to the language of the Church as the people of God (*Evangelii gaudium*), and for local churches to develop their own solutions to the challenges they face (*Amoris laetitia*), Francis is hopefully opening a door for a democratic Church. If the Church is to be a global voice for social, political, and economic justice, it first must allow "a certain spirit of justice" (Derrida) to inform its own structures and actions.

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