THE MORAL PROBLEM OF ECONOMIC INEQUALITY:
AN ANALYSIS OF THE ROMAN CATHOLIC AND THE QUAKER TRADITIONS

A Dissertation

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by


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Abstract
by
Carla Marie Ingrando

In this project I have explored the moral significance of inequalities of income and wealth through an historical examination of the Roman Catholic and the Quaker traditions’ definitions, interpretations, and analyses of economic inequality. One of my concerns has been to enhance the moral force of arguments against increasing inequality (or stated positively, to enhance the moral arguments for relative economic equality).

As sources for moral arguments against inequality, I turned to the teaching documents of the Roman Catholic and Quaker branches of Christianity. I chose to draw on these two traditions because of their longstanding and visible commitments to working for social justice and also because of the striking differences in their organizational structure. The Catholic and Quaker traditions turned out to be instructive in an unexpected way – both evaded the problem of inequalities of income and wealth.

While the two traditions evaded the particular problem of inequality of income and wealth, both have conceptual resources which can be utilized to mount a vigorous critique of economic inequality both internally and in the public sphere. The resources
within the Roman Catholic tradition that could and should contribute to an ethic of relative economic equality include an egalitarian theological anthropology, the principles of universal destination of goods and the right use of property, the virtue/value of solidarity, the value of participation, and a theology of work. The resources within the Quaker tradition that could and should contribute to an ethic of relative economic equality include the testimonies of equality, peace, simplicity, and stewardship as well as Quaker decision-making processes and a Quaker spirituality of work.

In this project, I have been most concerned to show how the traditions can and should generate more internal dialogue about the problem of inequality. I have proposed the development of Catholic and Quaker theologies of equality as the foundation for robust ethics of relative economic equality. The development of theologies of equality would also, importantly, be an opportunity for and a means to mounting an integrative theo-ethical critique of the interconnected inequalities associated with race, gender, and class.
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<td>BYM</td>
<td>The Yearly Meeting of the Religious Society of Friends (Quakers) in Britain</td>
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<td>Catholic Social Teaching</td>
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CHAPTER ONE

THE PROBLEM OF ECONOMIC INEQUALITY

1.1 A Picture of Economic Inequality in the United States and Globally

Inequalities of income and wealth have increased dramatically in the last twenty-five years. For example from 1979-2000 the average income of the top one percent of households in the United States grew 184.3% from $466,800 in 1979 to $1,326,900 in 2000. In the same period (1979-2000), the incomes of the bottom twenty percent grew only 6.4% from $14,100 to $15,000.\(^1\) This trend moderated somewhat from 2000-01 when the income of the top 1% fell 20.9% to $1,050,100 and the income of the bottom 20% fell 0.7% to $14,900. As one might expect, the income shares of those at the top have also increased dramatically over time. In 1979, the poorest 20% of American households earned 5.8% of all income while the top 1% earned 9.3%. In 2000, the bottom 20% of households earned 4.2% of all income while the top 1% earned 17.8%.\(^2\)

Similarly, the top 20% of American households held an average of $939,300 or 81.3% of all wealth (assets minus debts) in 1983, while the remaining 80% of households held and average of $53,900 or 18.7% of all wealth.\(^3\) In 1989, the wealth of the top 20%

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\(^2\) Ibid.

\(^3\) Ibid., 282-3.
of households had increased to $1,105,100 and to an 83.5% share of all wealth. While the remaining 80% of households gained a bit in raw wealth moving up to an average of $54,500, they lost ground in terms of their share of wealth, falling to an average of 16.5%. By 2001, the top 20% of American households had climbed to $1,604,700 or 84.4% of all wealth, while the remaining 80% saw their average wealth increase to $74,000, but they also saw their average share of wealth fall to 15.6%.

The comparisons of wealth inequality are even more dramatic if we compare the top 1% to the bottom 20%. The top 1% has seen their average wealth grow from $7,795,800 in 1983, to $9,889,000 in 1989, to $12,692,100 in 2001. The lowest 20% of American households have seen their wealth fall from negative $3,500 in 1983 to negative $20,000 in 1989 and then increase to negative $8,200 in 2001.

Within the US, there are also inequalities of wealth and income along race and gender lines. For example, in 2003, the median income of White families was $55,768, while the median income for Black families was $34,369 and the median income for Hispanic families was $34,272. Similarly, the median wealth (household assets minus debts) for White households in 2001 was $106,400, while the median wealth for Black households was $10,700.

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4 Ibid. All amounts are in 2001 dollars.
5 Ibid.
6 Ibid., 283.
7 Ibid.
8 Ibid., 48.
9 Ibid., 285.
In terms of income disparities along gender lines, the ratio of women’s earnings to men’s earnings in 2003 was 81%.

Internationally, “income inequality is increasing in countries that account for more than eighty percent of the world’s population.” In China, for example, the ratio between the richest twenty percent and the poorest twenty percent (in terms of income or consumption) was 8:1 in 1998; it increased to 10.7:1 in 2001. In the same time frame the ratio of the richest ten percent to the poor ten percent increased from 12.7:1 to 18.4:1 and the Gini coefficient increased from 40.3 to 44.7. Income inequality is also increasing between countries. For example, “in 1990 the average American was thirty-eight times richer than the average Tanzanian. Today the average American is sixty-one times richer.”

While global inequality is tremendously important, this project focuses primarily on inequality within the United States. This is to highlight the fact that economic inequality matters even in a country where the most basic of needs – access to clean drinking water, sanitation, food, shelter, and clothing – are to a large degree met.

10 Ibid., 167.


13 Ibid. The Gini coefficient is a standard summary measure of inequality. See page six of this chapter for a brief explanation of the Gini coefficient.

1.2 Distinctions between Poverty and Inequality

At the outset, it is important to distinguish economic inequality from poverty. Poverty is a term used to describe those who fall below a socially defined level of material well-being. Poverty can be measured both objectively and subjectively. Objective or strictly financial measures of poverty can be more or less relative in comparison to the financial status of others. For example, in the United States, official poverty levels are based on a measurement developed in 1963-4, which determined the cost of purchasing basic food items and multiplied that by a factor of three. Subsequent yearly increases in the poverty threshold in the United States have been and continue to be tied to the Consumer Price Index. This measurement is not directly related to the financial status of others. The European Union’s approach to measuring poverty is relative to the financial status of others in that poverty is measured as falling below a certain percentage of median income. Since 2001, the European Union’s poverty threshold has been 60% of median income.

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Subjective measures of poverty are those which account for peoples’ perceptions of poverty. A customary definition of subjective poverty is: “poor individuals are those whose total net income is less than they consider absolutely necessary for a proper standard of living.” The testimonies of the poor, describing their perceptions of their own poverty, are often powerfully disconcerting. A grandmother in Fiji, for example when asked to define poverty states:

You ask me what poverty is. It is here, staring you right in the eye. Look at me! I live alone. I do not have enough food. I have no decent clothing or accommodation. I have no clean water to drink. Look at my swollen legs. I can’t get to the dispensary, which is too far for me to walk. I have to walk a mile to catch a bus. I cannot see well. I can no longer do any farming. So don’t ask me what poverty is. Just look and see for yourself.

This statement illustrates the coherence of academic and “on the ground” understandings of the basic goods necessary for a dignified life: food and clean water, shelter, clothing, transportation, and health/health care.

Subjective measurements of poverty are much more common in studies originating in European nations. In the United States, the most commonly used measurements of poverty are objective, such as the poverty statistics published by the

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18 From the findings of “Project 21” as reported in Christianity, Poverty, and Wealth, ed. Michael Taylor (Geneva: WCC Publications, 2003), 2.
Census Bureau. Even basic budgets, which go beyond census data to incorporate variables such as regional differences and costs such as childcare are objective.\(^{19}\)

Economic inequality is a term used to describe the gap between rich and poor; it is necessarily a relational concept.\(^{20}\) There are a variety of ways to measure inequalities of income and wealth. A standard, summary measure, which Hicks employs, is the Gini coefficient. In brief, the Gini coefficient is calculated by plotting the proportion of a population against the population’s cumulative holding of a particular good, like income, on a two-dimensional graph. As represented in Figure 1, a completely egalitarian distribution would result in a forty-five degree line. Inequalities are indicated when the graph takes the shape of a curve, known as the Lorenz curve. The Gini coefficient is defined as the ratio of the area between the egalitarian line of distribution and the Lorenz curve (indicated as “A” on the graph) and the area of egalitarian distribution (“A+B” on the graph). Stated more succinctly, the Gini coefficient is defined as the ratio of the area of A to the area of A+B.

As Hicks notes, “the Gini coefficient for a population can vary from 0 to 1; values near ‘0’ represent very low levels of inequality and values near ‘1’ represent high levels of inequality.”\(^{21}\) For example, the Gini coefficient for income in the United States in 2000, as calculated by the World Bank was 0.38, while the Gini coefficient for a county


\(^{21}\) Ibid.
that we would expect to be more equal, Sweden, was 0.25 and, similarly, the Gini coefficient for a country that we would expect to be more unequal, Chile, was 0.51.\textsuperscript{22} By comparing Gini coefficients over time, one can gauge whether inequality is increasing or decreasing.

In this study, I have relied more on ratios, like that of the average income of the top ten percent of households to the bottom ten percent of households, because they present a more vivid picture of inequalities. For example, the ratios of the incomes of the top ten percent to the bottom ninety percent in the US, Sweden, and Chile in the year

2000 were 6:1, 3:1, 11:1 respectively.\textsuperscript{23} Ratios, like Gini coefficients, can also be compared over time to show whether inequality is increasing or decreasing.

\textsection{1.3 Two Resources for Thinking about Economic Inequality: Michael Walzer and Amartya Sen}

My intellectual interest in the moral dimensions economic inequality was kindled in the fall of 1996 when I read Michael Walzer’s \textit{Spheres of Justice: A Defense of Pluralism and Equality}. Walzer begins with the assumption that men and women are each other’s moral and political equals, so long as “no one possesses or controls the means of domination.”\textsuperscript{24} The motivation driving his project is his worry about the domination of one group of persons over other groups and the unequal distribution of social goods as a means of domination. That is, he is not worried about wealth or privilege in and of themselves, but the fact that wealth and privilege have historically meant the domination of the rich over the poor, of the aristocrat over the commoner.

Walzer describes distributive justice as having “as much to do with being and doing as having, as much to do with production as with consumption, as much to do with identity and status as with land, capital, or personal possessions.”\textsuperscript{25} He goes on to describe a multiplicity of social goods -- “membership, power, honor, ritual eminence, divine grace, kinship and love, knowledge, wealth, physical security, work and leisure, rewards and punishments, and a host of goods more narrowly and materially conceived – food, shelter, clothing, transportation, medical care, commodities of every sort, and all

\textsuperscript{23} Ibid.


\textsuperscript{25} Ibid., 3.
the odd things (paintings, rare books, postage stamps) that human beings collect” – the value of which he understands to be socially constructed.\textsuperscript{26} Walzer further notes that the multiplicity of social arrangements for distributing these goods is enforced by different political arrangements and justified by different ideologies.

Walzer’s overall purpose in complexifying social goods and the means of distributive justice is to construct a theory of distributive justice in which “the principles of justice are themselves pluralistic in form.”\textsuperscript{27} Walzer argues that “different social goods ought to be distributed for different reasons; in accordance with different procedures, by different agents; and that these differences derive from different understandings of the social goods themselves – the inevitable product of historical and cultural particularism.”\textsuperscript{28} He makes a distinction between the claims that “monopoly [of a social good] is unjust” and that “the existing pattern of dominance and monopoly is unjust.”\textsuperscript{29} He argues that monopolies can be just so long as they do not result in dominance. For example, distributive justice could be served in a situation where a particular group monopolized wealth so long as this wealth was not able to be converted into dominance in other distributive spheres – such as education, security, or political power.\textsuperscript{30}

To be clear, one implication of Walzer’s theory is that inequalities of income and wealth are permissible so long as they do not serve as a means to dominate access to

\textsuperscript{26} Ibid., 3, 7.
\textsuperscript{27} Ibid., 6.
\textsuperscript{28} Ibid.
\textsuperscript{29} Ibid., 13.
\textsuperscript{30} Ibid., 17.
other social goods such as security, prestige, education, and leisure. Walzer argues that, while money is the dominant good in a capitalistic economy, money is not a naturally dominant good; history reveals that other goods, such as military and political power, religious office, and charisma, can and have been dominant. He goes on to argue that even if we were able, in contemporary society, to neutralize the dominance of money, another good would become dominant and new inequalities would emerge.

Walzer goes on to argue that wealth, power, and education, as they are currently understood within their own spheres, “tend to generate natural monopolies that can be repressed only if state power is itself dominant and if it is monopolized by officials committed to the repression.” He proposes an alternative: a society in which “different social goods are monopolistically held . . . but in which no particular good is generally convertible” and, as such, monopoly over a single good does not enable dominant access to other valued goods. So, for example, money should not be convertible to other valuable goods such as office, security, or education. In the case of education, Walzer provides the following description and analysis.

Historically, Walzer notes, schools “have mostly been elite institutions, dominated by birth and blood, or wealth, or gender, or hierarchical rank, and dominating, in turn, over religious and political office.” But these distributive criteria have little bearing on a student’s ability to learn and thus, in Walzer’s scheme, little bearing on how

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31 Ibid., 11.
32 Ibid., 14.
33 Ibid., 17.
34 Ibid.
35 Ibid., 201.
education should be distributed. He uses a folktale to illustrate his point. A great Talmudic sage, Hillel, was

an impoverished young man who wanted to study at one of the Jerusalem academies. He earned money by chopping wood, but barely enough money to keep himself alive, let alone pay the admission fees for the lectures. One cold winter night, when he had no money at all, Hillel climbed the roof of the school building and listened through the skylight. Exhausted, he fell asleep and was soon covered with snow. The next morning, the assembled scholars saw the sleeping figure blocking the light. When they realized what he had been doing, they immediately admitted him to the academy, waiving the fees. It didn’t matter that he was ill dressed, penniless, a recent immigrant from Babylonia, his family unknown. He was so obviously a student.36

Walzer uses the story to illustrate “a set of assumptions about how schooling should be distributed.”37 That is, ideally, income, wealth, and class are irrelevant to the distribution of education in a democratic state.38 For Walzer, need is one criterion of distribution: “If there is a body of knowledge that citizens must grasp, or think they must grasp . . . then they have to go to school . . . all of them have to go to school.”39 Two other criteria are interest and capacity.40 While everyone ought to be admitted to the school system because of need, students have different interests and capacities and will distinguish themselves accordingly.41 Walzer notes that “the aim is not to repress differences but rather to postpone them, so that children learn to be citizens first – workers, managers, merchants, and professionals only afterward.”42 He uses the example

36 Ibid., 201-2.
37 Ibid., 202.
38 Ibid.
39 Ibid.
40 Ibid., 203.
41 Ibid.
42 Ibid.
of reading to illustrate that the goal of education is egalitarian outcomes, not opportunities. That is “the goal of the reading teacher is not to provide equal chances but to achieve equal results. . . . He doesn’t try to make it equally possible for students to read; he tries to engage them in reading and teach them to read.”\footnote{Ibid., 203-4.}

Problems arise in the distribution of education, Walzer notes, when schools are pressured by corporations and government “to enlarge upon the natural distinctions that already exist among the students, to search out and mark off the future leaders of the country.”\footnote{Ibid., 204.} He implies that some of the manifestations of this interference are early tracking systems for “gifted” students, “the demands of business leaders for minimally educated and contented workers . . . the apathy and indifference of many parents trapped at the lower levels of the [socio-economic] hierarchy – and the arrogance of many other parents established at the upper levels.”\footnote{Ibid., 205.}

Once an equal basic education has been achieved (and Walzer does not define the constitution of basic; he says that this is a matter for political debate), then “education must be shaped to the interests and capacities of individual students. And the schools themselves must be more receptive to the requirements of the workaday world.”\footnote{Ibid., 207-8.} In this sense, Walzer is concerned about education itself becoming a dominant good. That is, he does not want education to become “the only path to adult responsibility.”\footnote{Ibid., 208.} But what

\footnote{Ibid., 203-4.}
\footnote{Ibid., 204.}
\footnote{Ibid., 205.}
\footnote{Ibid., 207-8.}
\footnote{Ibid., 208.}

12
about those students who want to pursue education beyond a basic level? How is higher education to be distributed? Ideally, Walzer would like to see higher liberal education available to anyone who wishes to pursue it, but he acknowledges that he “cannot provide any particular level of support for this provision.” He clearly states, however, that the criteria for distributing higher education cannot be “the exclusive privilege of a few people, picked out by state officials through a system of examinations.”

Walzer suggests stricter criteria for specialized and professional training will be necessary. Here, he says, interest and capacity alone cannot be the distributive criteria because “there are too many interested and capable people.” Walzer does not, however, indicate what the criteria should be. Rather, he suggests that it will be up to particular political communities to decide the criteria. He further suggests that the scarcity of such opportunities will lead established elites to press for earlier selection (i.e., identification of “gifted” students at a young age) and that this is not congruent with a just distribution of education.

Walzer claims that specialized and professional training is “necessarily a monopoly of the talented or, at least, of those students most capable at any given moment of deploying their talents. But this is a legitimate monopoly.” The limits on places for specialized and professional training lead Walzer to believe that it is all the more important that specialized and professional training are not convertible to status, power.

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48 Ibid., 209.
49 Ibid.
50 Ibid.
51 Ibid., 210.
52 Ibid., 211.
This is the crux of his theory of distributive justice: a monopoly of one good should not lead to dominance, i.e., superior access to other goods.

Walzer’s theory engaged, inspired, and captivated me because of my own concerns about justice, particularly distributive justice. A theory of complex equality made explicit the idea that human beings care about money because it enables us to procure other material and non-material goods, which we value. Personally, at this time, I cared little about material goods but I cared a great deal about non-material goods such as knowledge, security, and prestige. Walzer taught me to be cognizant of the possibility that these goods could also be dominant.

Walzer states up-front that his purpose in *Spheres of Justice* is to describe the regime of complex equality, not “how we might go about creating such a society.”54 My own mind, however, is drawn to the concrete and as I read his work I wondered and worried about the possibilities for implementing his theory.

Walzer argues that the political community is the appropriate setting for “the regime of complex equality” because it is here where we can come the closest to “a world of common meanings;” it is here where “language, history, and culture come together (or more closely together here than anywhere else) to produce a collective consciousness.55 I have concerns about Walzer’s assumption of a collective consciousness and its formation. He somewhat cavalierly assumes that a “sharing of sensibilities and intuitions among the

53 Ibid.
54 Ibid., xiv.
55 Ibid., 28.
members of a historical community is a fact of life." It seems to me that sensibilities and intuitions within a political community can be quite diverse and contested. One the one hand, in the United States, we do likely share intuitions and sensibilities that murder is wrong and prosperity is good. But on the other hand, our sensibilities and intuitions regarding the use of unilateral force, the rights of same-sex couples to marry, and significance of the rich-poor gap are deeply divided.

It seems to me that in order for the regime of complex equality to “work,” the political community would have to buy into it – i.e., it would require a radical change in ideology and worldview. Changing ideologies and worldviews is incredibly complex and may take generations to achieve. Walzer’s project, which is rich in description, can itself begin a process of change. The question that gnawed at me and which continues to bother me, however, is what do we do in the meantime? That is, as Walzer rightly notes, money is the dominant good in a capitalistic economy. Money is likely to be the dominant good for the foreseeable future. Even if we were able to begin a transition to the “regime of complex equality” inequalities of income and wealth will remain pressing social, political, and moral problems so long as money is the dominant social good.

In hindsight, Walzer’s work likely captivated me because of my experience of the social inequalities caused by the dominance of money. I had worked with homeless men in the early 1990s, and the connection between having money and obtaining security in terms of a safe place to live was very clear. The connection between having money and obtaining social recognition or prestige was also striking. I had also worked, in the early 1990s, with children who were wards of the state. They were not in the best schools

56 Ibid.
pursuing a college preparatory curriculum. Nor were they tracked at any point as “gifted” students. They did not have parents who were saving money to send them to college. Here, the connection between money and education was evident.

Scholarly analysis supports my anecdotal observation of the connection between income and wealth and education. A recent study by Anthony Carnevale and Stephen Rose found that at the top one hundred forty six colleges in the US, more than 70% of students are drawn from the wealthiest 25% of families, while fewer than 10% of students come from the poorest 25% of families.57

There are also important correlations between income and wealth and political participation, political voice, and government responsiveness. For example, 86% of those with annual family incomes over $75,000 vote while only 52% of those with family incomes of less than $15,000 per year vote; 56% of those with annual family incomes over $75,000 make political contributions, while only 6% of those with family incomes under $15,000 per year do, and 50% of those with annual family incomes over $75,000 contact public officials, while only 25% of those with family incomes under $15,000 per year do.58 Perhaps even more striking is the fact that both the Democratic and Republican parties solicit active participation from wealthier voters. That is, the average family income for those asked by a fellow partisan to work for or contribute to a political


campaign for both parties was roughly $50-55,000 in 1990. While Verba, Schlozman, and Brady’s study indicate that money is convertible to the most basic acts of political participation and voice, Walzer argues that a monopoly in the sphere of money (income and wealth) should not be convertible to political power. While I agree that it is in the interest of distributive justice to limit the relationship between money and political participation and power (for example by means of campaign finance reform), it also seems to me that a more equal distribution of income and wealth would contribute to equalizing political participation and power and is conceptually simpler and, as such, perhaps more feasible.

In the spring of 2000, my interest in economic inequality as a particular problem within the broader context economic justice was rekindled when I encountered the work of Amartya Sen. Sen poses what seems like a simple question, equality of what? Sen, like Walzer, notes that income is merely a means to a set of ends. He argues that an overemphasis in poverty debates on income poverty and income inequality distorts the debates, leading to “the neglect of deprivations that relate to other variables, such as unemployment, ill health, lack of education, and social exclusion.” Sen’s motivation, the driving force behind his project, is a concern to expand “the real freedoms that people


60 Walzer, Spheres of Justice, 281-311.


62 Sen, Inequality Reexamined, 29.

An important difference between Walzer’s project and Sen’s is that Walzer assumes a first-world, democratic context, while Sen’s project is constructed with developing nations in mind. This difference leads Walzer to assume some of the freedoms that Sen focuses on as goods or opportunities to be obtained and equalized.

The end or good on which Sen focuses is freedom, particularly freedom “to do the things one has reason to value.” Sen distinguishes freedom to achieve from actual achievement. Most important for Sen is the freedom to achieve particular outcomes, not the outcomes themselves. Sen focuses particularly on: political freedoms; social opportunities; economic facilities; transparency guarantees; and protective security. He argues that freedoms are both the means and ends of development and that different kinds of freedoms are interrelated and, as such, can strengthen one another. For example, “political freedoms in the form of free speech and elections help to promote economic security, while social opportunities such as education and health facilitate economic participation, and economic facilities, such as opportunities for participation in trade and production, in turn, can help to generate personal abundance as well as public resources for social facilities.”

My concern about Sen’s project is that, in a capitalistic society, income and wealth are more important means to the freedoms Sen identifies than he acknowledges;

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64 Sen, *Democracy as Freedom*, 1 and *Inequality Reexamined*, xi.
68 Ibid., 10.
69 Ibid., 11.
his project serves to obscure the connection between income and wealth and goods human beings have reason to value. For example, he points to social deprivations such as education and health. He argues if freedom to achieve basic education and health care were improved, quality of life and a person’s ability to earn income would improve.\footnote{Ibid., 90.}

This is true, but at the same time in the US, where there is freedom to achieve a basic education, there are still tremendous inequalities between rich and poor. Similarly, the US is an example of a nation that protects the freedom of speech, but this has not quelled the increasing economic inequality between those at the top and those at the bottom in the last twenty plus years. Thus, Sen’s proposals may address the lot of the poorest of the global poor, but they do not address the great gap between rich and poor in a nation like the US where many of the freedoms that Sen advocates are available.

The Roman Catholic tradition has indicated that health, education, work, and security are goods that human beings have reason to value. The Catholic tradition gives voice to the value of these goods in its papal encyclical tradition. For example, in \textit{Pacem in Terris}, John XXIII argued that precisely because human beings are people they have rights and obligations flowing directly and simultaneously from their very natures (9). These rights and obligations include “the right to life, to bodily integrity, and to the means which are suitable for the proper development of life; these are primarily food, clothing, shelter, rest, medical care, and finally the necessary social services” (11). The right to life and the means to develop it in terms of food, shelter, rest, and medical care imply the valuing of the good of health because food, shelter, rest and medical care are all necessary for health. John XXIII went on to argue that “a human being also has the right to security in cases of sickness, inability to work, widowhood, old age, unemployment, or
in any other case in which he is deprived of the means of subsistence through no fault of
his own” (133). Here, security is elevated from a value to a right. He further argued that
“the natural law also gives man the right to share in the benefits of culture and therefore
the right to a basic education and to technical and professional training in keeping with
the stage of educational development in the country to which he belongs” (PT 13). Like
security, education is elevated to the status of a right. Lastly, in terms of the goods I have
identified, John XXIII argued that “man has a right by the natural law not only to an
opportunity to work, but also to go about his work without coercion” (PT 18). Work, like
security and education, is not only a value but it is so highly valued that the Roman
Catholic tradition has given it the status of a right.

The Roman Catholic tradition also gives voice to the values of equality,
participation (in the social, political, and economic spheres), and solidarity. One of the
tradition’s strongest and most concise statements about equality is found in Gaudium et
Spes: “Since all men possess a rational soul and are created in God’s likeness, since they
have the same nature and the same origin, have been redeemed by Christ, and enjoy the
same calling and destiny, the basic equality of all must receive increasingly greater
recognition” (29a). The value of participation was expressed strongly by both Pius XI
and Paul VI, with Paul VI noting that the equality and participation are two forms of
human beings’ dignity (OA 22). John Paul II developed the value of solidarity most
eloquently. He indicated that solidarity is not only a value but a Christian virtue (SRS
40a).

In the light of faith, solidarity seeks to go beyond itself, to take on the
specifically Christian dimension of total gratuity, forgiveness, and
reconciliation. One’s neighbor is then not only a human being with
his or her own rights and a fundamental equality with everyone else,
but becomes the living image of God the Father, redeemed by the blood of Jesus Christ and placed under the permanent action of the Holy Spirit. One’s neighbor must therefore be loved, even if an enemy, with the same love with which the Lord loves him or her; and for that person’s sake one must be ready to sacrifice, even the ultimate one: to lay down one’s life for the brethren (SRS 40b).

The Quaker tradition gives voice to the values of equality, peace, independence, and control over one’s own life. For example, in Philadelphia Yearly Meeting’s *Faith and Practice* published in 2002, equality and peace are cited as testimonies, “deeply held, historically rooted attitudes or modes of living in the world.”71 The testimony of equality is described as belief that “there is that of God in every person and . . . [belief] in human equality before God.”72 In this text as in its 1997 *Faith and Practice*, Philadelphia Yearly Meeting goes on to indicate that the realization of equality “involves such matters as independence and control of one’s own life.”73

It is my claim that because of the practical importance of income and wealth in enabling persons to secure goods they have reason to value – like health, education, work, security, equality, participation, peace, independence, and a certain amount of control over one’s own life – we must work to better distribute income and wealth. In so doing, I do not intend to indicate that income and wealth are the only goods we have reason to value. To the contrary, it is because income and wealth are the means to other goods that they are valuable. Similarly, I do not intend to indicate that equality of income and wealth is the only form of equality that is important. Gender and racial equality are

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72 Ibid., 75.

73 Ibid.
also very important. Again, it is because income and wealth are so readily convertible to other goods that I am concerned with a more equal distribution of them.

Toward the end of realizing a theology of equality and an ethic of relative economic equality (understood as relative equality of income and wealth), in this study I examined the primary teaching documents of the Roman Catholic and Quaker traditions. By relative equality, I mean “a situation in which inequalities are held within a defined range set by moral limits.” Since both of these traditions profess to value equality, I asked what kind of equality they value. Particularly, I investigated whether they value relative equality of income and wealth. I found that both traditions in fact evade the issue of equality of income and wealth. Yet, both traditions have resources within them – like the values of equality, participation, solidarity, and peace – that could and should lead to theologies of equality and ethics of relative economic equality.

1.4 The Contribution of Christian Ethics to the Debate

While Christian theologians and ethicists are paying sustained attention to broad concerns of economic justice, such as sustainability, capitalism, the market economy, poverty, and trade, few, it seems are working on the particular issue of economic inequality. In some cases, this is because Christian ethicists claim that economic

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inequality, as it exists in the US today, is not morally problematic. This view is expressed by Christian ethicists Michael Novak and John R. Schneider. Schneider, relying heavily on the work of American Enterprise Institute scholar Dinesh D’Souza, argues that the rich have gotten and are getting richer because they are creating new wealth. Schneider further argues that by creating new wealth the rich have raised the standard of living enjoyed by the poor. And, although the poor have gained ground at a slower pace than the rich, inequality is morally neutral because the creation of new wealth has benefited the poor.⁷⁶ He goes so far as to claim (again relying on D’Souza) that poverty understood as the absence of food, clothing, and shelter is no longer a significant problem in the US.⁷⁷

Schneider’s analysis contains an empirical claim – that capitalism creates more wealth for all, a value judgment – that poverty is the absence of food, clothing, and shelter (not other social goods such as health care, education, etc.) and an ethical conclusion – that so long as the basic needs (food, clothing, and shelter) of all are met, economic inequality is morally neutral. While Schneider’s empirical claim is debatable, it is his claim for the ethically neutrality of inequality – even when basic needs are met – that I challenge in this project. While neither the Catholic nor the Quaker tradition explicitly engages in a similar critique of economic inequality, the resources within these traditions, particularly the values of equality, solidarity, participation, and peace all can contribute to a theology of equality and an ethic of relative economic equality.


⁷⁷ Ibid., 22.
The most comprehensive contemporary reflection on economic inequality by a Christian ethicist is Douglas Hicks’s *Inequality and Christian Ethics*. Hicks both presents economic data about inequality and moves to constructing his own moral framework whereby to interpret and respond to the data. In organizing his project, Hicks employs the methodological framework of liberation theology, moving from socioanalytic mediation (critically engaging the economic data) to hermeneutic mediation (looking explicitly at theological resources) and, finally, to practical mediation (proposals for public policy and social action). Hicks is concerned with showing in his socioeconomic analysis that inequalities of income and wealth are not the only kind of inequalities that matter. He indicates that inequalities of health and education are also important and these are not necessarily correlated with income inequality.\(^{78}\)

In disaggregating income and wealth from capabilities and functionings, Hicks is drawing on the work of Amartya Sen. He notes that “the ‘capability approach’ . . . enables moral, social, and economic analysis to capture multiple dimensions of human development and well-being.”\(^{79}\) On the one hand, I agree. Income and wealth matter to people because of what they can buy – health, education, and security. On the other hand, I am concerned that to shift the focus away from inequalities of income and wealth obscures the extent to which money matters if not in terms of access to a particular good then in terms of access to higher qualities of that good. For example, Hicks calculates Gini coefficients for income, education, and health/longevity in the United States. The


\(^{79}\) Hicks, *Inequality and Christian Ethics*, 42.
Gini coefficients indicate that while income inequality increased in the last two decades of the twentieth century, education and health/longevity have become more equally distributed.\textsuperscript{80} This would seem to indicate that income inequality and inequalities in education and health/longevity are unrelated. Yet, as Hicks notes “these data cannot capture all aspects of inequality in education or health/longevity.”\textsuperscript{81} For example, to calculate the Gini-coefficient for education Hicks used “years of schooling” as a proxy indicator for equality.\textsuperscript{82} As he rightly notes, this means that the statistical data does not capture differences in the quality of education.\textsuperscript{83} Hicks’s conclusion and emphasis on the fact that income inequality and educational inequality are not correlated is also hard to reconcile with other data. For example, the National Center for Educational Statistics reports that “kids [in the US] from the lowest income quarter are more than six times as likely to drop out of high school as kids from the highest.”\textsuperscript{84} Similarly, a study by Campbell et al. found that “family income and wealth have positive and statistically significant links to [educational] attainment: children who grow up in families with higher income and greater wealth receive more schooling.”\textsuperscript{85} My point is that the Gini coefficient (and correlations between Gini coefficients) may not tell us all we need to know about the relationship between inequalities of income and wealth and educational attainment.

\textsuperscript{80} Ibid., 70.
\textsuperscript{81} Ibid.
\textsuperscript{82} Ibid., 253.
\textsuperscript{83} Ibid., 70, note 19.
\textsuperscript{84} Nathan Thronburgh, “Dropout Nation,” \textit{Time}, April 17, 2006, 33.
\textsuperscript{85} Campbell, Haveman, Sandefur, and Wolfe, “Economic Inequality and Educational Attainment across a Generation,” 12.
Hicks’s theological sources are H. Richard Niebuhr and Gustavo Gutierrez. Drawing on Niebuhr, Hicks makes the following claims: moral equality is universal; persons have responsibility for fellow citizens; equality before God is also a statement about human limitations (i.e. human beings are also equal in original sin); persons do not share equally in the consequences of sin (for example, they do not share equally in injustice and oppression); society is a place in which genuine relationships of “responsibility in universal community” in which God’s goodness, love, and order operate, and excessive inequality must be limited because absolute concentrations of economic and/or political power tempt people to act like gods.\textsuperscript{86}

Hicks draws two primary insights from Gutierrez. The first is the preferential option for the poor component of liberation theology, which prioritizes giving to those lacking basic (often material) goods and services, while at the same time retaining a universal commitment to equality of all. The second insight Hicks draws from Gutierrez is the idea of integral liberation, which reflects a commitment to complex equality, i.e. the provisioning of multiple social goods in multiple spheres of life.\textsuperscript{87} Hicks ultimately crafts his own normative moral framework, drawing on the above theological insights as well as insights from political philosophy and economic development literature (primarily Amartya Sen). Hicks employs the concepts of solidarity, selfhood, and social goods in developing his framework.

Hicks is seeking to construct a social ethic that is consistent with his Reformed and Liberation sources (Niebuhr and Gutierrez). He argues that a social ethic that is

\textsuperscript{86} Hicks, \textit{Inequality and Christian Ethics}, 137-138.

\textsuperscript{87} Ibid., 158.
consistent with these sources must capture both the universality and preference of God’s love. For Hicks, solidarity is the concept that captures both the universal and preferential dimensions of God’s love. Hicks defines solidarity as “a quality of social relations within some population in which all people experience a genuine sense of stake in the ongoing life of that collective.” Solidarity, for Hicks, indicates that in order for all people to experience a genuine stake in the ongoing life of the community, “preferential care is required in the space of various, basic social functionings.”

A second central concept in Hicks’s ethic is selfhood. For Hicks, “the divine-human relationship implies that life is more than material survival; it is rather life lived with the transcendent God as the source of one’s own being and sacred worth.” Hicks understands the divine-human relationship to mean that “people are called to know and experience their lives as theocentrically situated selves.” He further argues that “being theocentrically situated orders people’s lives as socially and materially situated as well.” The significance of Hicks’s understanding of human beings as theocentrically, socially, and materially situated is that “human dignity is realized within the confines of finite existence in creation.” Thus, the realization of human dignity cannot be limited to the spiritual realm; human dignity is also realized in the social and material spheres. This theological analysis of human beings as theocentrically, socially, and materially situated

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88 Ibid., 168.
89 Ibid., 171.
90 Ibid., 170.
91 Ibid., 179.
92 Ibid.
93 Ibid., 179-80.
94 Ibid., 180.
leads Hicks to the determination that “material goods are social goods” because they “convey important, and possibly dehumanizing, social meanings.” 95

The third and final central concept in Hicks’s social ethic is the concept of social goods. Material goods are social goods for Hicks because “social relations are mediated by economic goods within any system of production.” 96 Hicks goes on to argue that “goods hold particular meanings within human communities [and] the types and quantities of good that need to be held will be determined within these communities as well.” 97 For example, the type and quantity of education necessary to participate in social, political, and economic life in a large metropolitan area may be different than the type and quality of education necessary to participate in social, political, and economic life in a remote village. Thus, Hicks concludes “the situated nature of selfhood implies that relative holdings of important social goods are proper factors in the evaluation of people’s well-being,” because “as socially situated, people’s place in socioeconomic distributions impacts on their sense of selfhood.” 98

Hicks’s constructive proposal (practical mediation in the liberationist framework) is for an inequality-adjusted human development index. The human development index itself is a measurement of human well being that moves beyond aggregate national income to include such factors as life expectancy at birth, adult literacy, and children’s

95 Ibid., 183,189.
96 Ibid., 188.
97 Ibid., 190.
98 Ibid., 191.
education. Hicks proposes that measures of human development ought to more explicitly incorporate concerns about distribution.

The contributions of Christian ethics to the broader academic and public debates about economic inequality begin to emerge in this review of Hicks’s *Inequality and Christian Ethics*. Hicks himself identifies three distinct contributions of Christian ethics to the inequality debate. First, he argues, that Christian ethics provides moral vision and justification for why inequality matters. For Hicks, the Christian moral vision is based on ethical commitments to equality and solidarity. A second contribution of Christian ethics to the inequality debate, again based on the commitment to equality and solidarity, is “the moral example of Christian persons and communities engaged in actions of preferential solidarity.” A third contribution of Christian ethics Hicks identifies is the ability of theological language and imagery to move people – both within and beyond the Christian community – to action, which, in turn can effect positive social change.

While I value Hicks’s contribution greatly, I worry about his “Christian” approach. That is, while he argues that *churches* can be agents of social change, Hicks draws on Gustavo Gutierrez and H. Richard Niebuhr to craft a *singular* Christian analysis of the problem of economic inequality. It seems to me, however, that significant

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100 Hicks, *Inequality and Christian Ethics*, 229.

101 Ibid., 200.

102 Ibid., 232.

103 Ibid., 200.

diversity exists in different traditions’ resources for analyzing economic inequality, and if, as a Christian ethicist, I want to persuade churches to be agents of social change on the issue of economic inequality, they will be most persuaded (and I will be most effective) if arguments for economic equality are drawn from their specific traditions. Thus, my project differs from Hicks’s in terms of assumptions, sources, and audience. That is, while Hicks assumes that Christian ethics understands economic inequality as a problem, I am more skeptical that churches have recognized inequality (and not simply poverty) as a problem. Thus, I interrogate the teaching texts of two traditions with strong social justice commitments whereas Hicks draws on the work of two well-respected theologians, one of whom (Gutierrez) is a marginal voice within his own tradition (Roman Catholic). This is not to say Gutierrez is not an important Catholic voice, only that his work is not central to the institutional Catholic Church, which implies that what is communicated to adherents may be something other than what Gutierrez teaches. Lastly, while Hicks’s primary audience is intellectuals and public policy makers, my primary audience is adherents to the two traditions examined in the study, Roman Catholic and Quaker, and the leaders of these traditions. Hicks is concerned with showing how Christian ethics can deepen a public debate about inequality. My primary concern is to get the churches and their members to deepen their own internal debates about inequality so that they can be agents of social change.

Toward the end of stimulating two particular churches in their role as agents of social change, I analyze the interpretations of and responses to economic inequality by the Roman Catholic Church and the Religious Society of Friends (Quakers). I chose these two branches of the Christian family tree because of their respective commitments
to social justice and because of their ecclesial differences. Both traditions have well-established social service agencies and legislative advocacy agencies. Catholic Charities, Catholic Relief Services, and American Friends Service Committee (a Quaker organization) for example, all work to alleviate the effects of economic injustice. Similarly, the United States Conference of Catholic Bishops (USCCB) and Friends Committee on National Legislation (FCNL) both work to lobby for policies that are in line with Catholic (in the case of the USCCB) and Quaker (in the case of FCNL) values.

Ecclesiastically, the two traditions are very different. The Roman Catholic Church is the largest Christian group in the world with roughly one billion adherents. Quakers number only three hundred thousand worldwide. The difference in the size of the two groups is similar in the US, where Roman Catholics number seventy-two million and Quakers number one hundred thousand. The Catholic and Quaker traditions also differ in organizational structure. The Roman Catholic Church has an elaborate hierarchy, with the Bishop of Rome situated at the top, followed by archbishops, bishops, priests, and laity. Teaching authority rests with the bishops and pope. Doctrinal and liturgical authority also rests with bishops and pope. Thus, prescriptions for belief and practice come from the top down. Quakers do not have an ordained ministry, nor do they have a central teaching, doctrinal, or liturgical authority. Local meetings are organized into regional and yearly meetings, but authority remains with members and their delegates.

105 www.adherents.com. This website is authored by Preston Hunter, a computer programmer. While sociological research on religious adherents is an avocation for Mr. Hunter, he has used the studies of others in order to create a comprehensive internet resource for scholars. The bibliography posted on the site is extensive, adding to my confidence in the reliability of the data. The site defines an adherent as “someone who claims to belong to or worship in a religion.”

106 Ibid.

107 Ibid.
Initially, I wondered whether the egalitarian structure of the Religious Society of Friends would lead Quakers to value economic equality more than Roman Catholics. I wondered whether the Roman Catholic tradition would be reluctant to criticize economic inequality because of its hierarchical, unequal structure. At the same time, I also wondered whether the centralized authority of the Roman Catholic Church might allow it to develop more concrete and specific descriptions and analyses of economic inequality, while Quaker descriptions and analyses might be watered down because of their process of making decisions by consensus. I found that the Catholic tradition’s analyses of economic problems were much more concrete, yet the Quaker testimonies offered a direct means of developing a critique of economic inequality.

Thus, while I affirm Hicks’s suggestion that the contribution of Christian ethics to the public debate about economic inequality consists of moral vision, moral example, and moral motivation, I would caution that before Christian traditions can contribute to the public debate about economic inequality, they have to be clear about their own moral vision regarding this issue. My study of the Catholic and Quaker traditions suggests there is a fair amount of ambiguity within both traditions regarding whether or not economic inequality per se is a moral problem. I would also add that distinct Christian traditions can come together to suggest particular policies and practices that would alleviate economic inequality.

Two of the concepts that emerged from my study of the Catholic and Quaker traditions as important for addressing the problem of economic inequality are congruent with those that Hicks employs in his framework – solidarity and social, political, and economic participation. Interestingly and perhaps importantly in terms of intra-Catholic
dialogue, the fact that the concept of solidarity emerges out of my study of the papal encyclicals indicates that Gutierrez and the Catholic magisterium have an important commonality. The shared appeal to solidarity is interesting and important because of perceived and real criticism of Gutierrez’ liberation theology by the Vatican. My study also indicates that more explicit attention to the development of theologies of equality is necessary for the construction of an ethic or multiple, denominationally specific ethics of relative economic equality. Further, my study found several additional resources for constructing an ethic (or ethics) of relative economic equality – a spirituality of work, the Catholic principles of universal destination of goods and right use of property, and the Quaker peace testimony, which criticizes economic inequality on the grounds that economic inequality leads to violence.

I conclude my study by utilizing the nascent theologies of equality, spiritualities of work, principles of universal destination of goods and right use of property, and testimonies of peace, simplicity, and stewardship to suggest placing a concrete limit on inequalities of income and wealth. That is, I suggest that the income and wealth of the richest should be limited to seven times that of the poorest. My constructive proposal, then, differs from Hicks who focuses on equality of basic capabilities and an inequality-adjusted human development index. I focus on inequalities of income and wealth because money is so easily converted into other goods human beings have reason to value.

1.5 Chapter Summaries

The remainder of this dissertation unfolds as follows. In chapter two, I analyze textual sources in the Roman Catholic tradition, specifically the modern papal social
encyclicals to see how official Catholic social teaching has supported and challenged economic inequality. My aim is to see if there are conceptual resources to support a Catholic theology of equality and a Catholic ethic of relative economic equality. I find that several conceptual resources emerge including a theological anthropology that lends itself to a theology of equality, a spirituality and theology of work, the principles of universal destination of material goods and the right use of property, and the values of participation and solidarity.

Similarly, in chapter three, I analyze textual sources in the Quaker tradition, specifically, the books of faith and practice of the Philadelphia Yearly Meeting and the Britain (formerly London) Yearly Meeting of the Religious Society of Friends. My aim here is to see if there are conceptual resources to support a Quaker theology of equality and a Quaker ethic of relative economic equality. As with the Catholic tradition, several resources emerge including the testimonies of equality, peace, simplicity and stewardship, as well as a Quaker spirituality of work and the value of participation as it is exemplified in Quaker decision-making processes.

The analysis in chapters two and three show that while there are conceptual resources for constructing Catholic and Quaker theologies of equality and ethics of relative economic equality, both traditions have more often than not evaded the problem of economic inequality. The aim of chapter four is to explain why this is the case. In brief, the reasons for the Roman Catholic evasion of a critique of inequalities of wealth and income are fourfold: a spiritualization of equality by Leo XIII, meeting basic needs has taken precedence over equality, social harmony has taken precedence over equality, and a priority of freedom over equality by John Paul II. The reasons for the Quaker
evasion of equality of income and wealth are also fourfold: a focus on internal matters in the nineteenth century, a spiritualization of equality, valuing of internal harmony over economic equality, and the slow pace of Quaker decision-making.

The aim of chapter five is to explore in depth the resources for Catholic and Quaker theologies of equality and ethics of relative economic equality. While I want to respect the uniqueness of each tradition’s concepts and categories for describing and analyzing economic inequality as a moral problem, in this chapter I also explore the common ground on which Catholics and Quakers might organize and motivate a coalition to advocate for greater economic equality in the United States and globally. Some common ground can be found in the two traditions’ affirmation of fundamental human equality, their principles for regulating the distribution of goods, the connections both make between inequality and peace, the focus of both on the importance of social, political, and economic participation, and their respective theologies of work. Finally, in this concluding chapter, I make a case for concretely limiting the gap between rich and poor to 7:1. That is, I argue that the rich should not have more than seven times the income or wealth of the poor because greater disparities limit social, political, and economic participation and hence threaten the realization of human dignity.
CHAPTER TWO

ANALYSES OF ECONOMIC INEQUALITY IN OFFICIAL ROMAN CATHOLIC SOCIAL TEACHING

2.1 Introduction to the Chapter

In his 1984 article “On Relative Equality: Catholic Egalitarianism after Vatican II,” Drew Christiansen argued that the “correction of inequality becomes the key to the social strategy of the Church” in conciliar and post-conciliar Catholic social teaching (CST). He indicated that the reasons for this shift were methodological. That is, when Catholic social teaching shifted from a deductive to an inductive approach, which included a theological reading of the signs of the times, inequality was identified as the major problem of the day and “egalitarian distribution becomes the means of redressing many injustices.”

I agree with Christiansen that the apex of CST’s concern for economic inequality occurred in conciliar teaching, especially Gaudium et Spes, although I think attention to inequality begins emerging in Pius XI’s Quadragesimo Anno. Leo XIII was most concerned with abject poverty, and he envisioned socio-economic stratification as divinely sanctioned and morally beneficial. Pius XI, influenced by the circumstances preceding and following the First World War, was concerned about the consolidation of

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109 Ibid.
economic power and its consequences for social order. As such, he moved in an egalitarian direction. He envisioned a more participatory role for workers in the ownership and management of business, via “functional groups,” which would lead to a better distribution of profits and engender social harmony. Nonetheless, Pius XI also maintained Leo XIII’s three-tiered framework when applying the principle of right use, allowing that persons ought to retain enough income “in order to live as becomes his station” (QA 50). This, and his reference to the lot of workers being the result of “divine providence” (QA 137) seem like unfortunate holdovers of an outdated vision of a divinely ordained stratified society in an otherwise progressive and egalitarian-leaning document. John XXIII identified economic inequality as the primary social problem of the 1960s in *Mater et Magistra*. The Second Vatican Council in *Gaudium et Spes* articulated an egalitarian vision of human nature and linked this to a requirement to mitigate economic and social differences between human beings. Paul VI built upon the theological anthropology of *Gaudium et Spes* in *Octogesima Adveniens*, arguing that equality is a fundamental aspect of human dignity, but he shifted the focus from relative economic equality, especially in terms of outcomes, to political equality, especially in terms of participation. John Paul II continued to shift towards thinking of equality not in terms of economic outcomes but rather in terms of freedom, including equal freedom for economic initiative.

The purpose of this chapter is to show how textual sources in the Roman Catholic tradition have both supported and challenged economic inequality. How has the Roman Catholic tradition defined the problem of economic inequality and how have these definitions supported or challenged inequalities? How has this religious tradition
understood and analyzed the causes and effects of as well as the solutions to economic inequality, and how have these understandings and analyses supported or challenged inequality? How have fundamental theological beliefs of the Roman Catholic tradition shaped the definitions and analyses put forth by this tradition, and how have these beliefs functioned in supporting or challenging economic inequality? How have social, political, and economic theories influenced the tradition’s descriptions and analyses of economic inequality, and how has its embracing or challenging of prevailing theories facilitated its ability to support and/or challenge economic inequality?

I approach the textual analysis of Roman Catholic sources chronologically, focusing on the modern papal encyclical tradition, beginning with Leo XIII’s *Rerum Novarum* (1891) and working through John Paul II’s *Centesimus Annus* (1991), in order to show developments and divergences in the tradition. I have chosen the encyclicals as my point of departure because, in the Roman Catholic tradition, these documents represent the official teachings of the Church about economic, political, and social conditions. Official teachings are important because, while they may be contested, they represent the tradition’s best efforts to offer unified and coherent statements about the beliefs, commitments, and practices of a diverse yet particular community of believers. Charles Curran notes, “there is no official canon of these papal documents,” but he goes on to provide a list of fifteen documents that are generally included in the unofficial canon in the United States.110 Because of their particular relevance to the problem of economic inequality, I will analyze ten of these documents: *Rerum Novarum* (1891), *Quadragesimo Anno* (1931), *Mater et Magistra* (1961), *Pacem in Terris* (1963),


In the Roman Catholic tradition, discussion and analysis of economic inequality is bound-up with the explication and analysis of poverty. This is because the two problems, while not equivalent, are interrelated. Economic inequality may be a cause of poverty, and certainly in contemporary societies, inequality and poverty almost always seem to co-exist. Thus, the lessening of inequalities is often perceived as an important solution to poverty, but economic inequality may or may not be perceived as a problem in and of itself.

Because the Roman Catholic tradition’s analyses of poverty and inequality are interconnected, it is important to distinguish them in order to show how the tradition’s texts have both supported and challenged inequality. Certainly, one reason that inequality is morally problematic is because it contributes to the problem of poverty. At the same time and without discounting the importance of the problem of poverty, I have argued in chapter one that economic inequality in and of itself, even if it persisted in the absence of poverty is morally problematic. Thus, the objective of this analysis is to show how the Roman Catholic tradition’s textual resources support and challenge economic inequality. Poverty, then, is a secondary, not primary focus of the analysis.

2.2 Rerum Novarum

The 1880s was a decade of wealth consolidation. In 1882, for example, John D. Rockefeller consolidated control of the US oil industry, creating a trust whereby nine men controlled ninety-five percent of the industry. The 1880s was also a decade of labor unrest. In 1882, the US saw thirty thousand workers join the first Labor Day March in
New York City. In 1886, one hundred thousand US workers struck for an eight-hour day. In 1889, thirty thousand London dock workers went on strike for better wages; after one month their demands were met. The 1880s was also a decade in which social welfare legislation began to be passed. Between 1883 and 1889 in Germany, old age pensions, disability insurance, and health insurance were legislated.

Ecclesiastically, the late nineteenth century was a time in which authority and power in the Church were centralized in the papacy. The eighteenth and nineteenth centuries had been a time of challenge to papal authority. Within the Catholic tradition, this challenge came from Gallicanism, which favored the primacy of local bishops or the entire ecclesial assembly. From outside of the Catholic tradition, papal power and authority were challenged by the French revolution, which “almost succeeded in destroying the French Catholic Church both institutionally as well as physically.” The Vatican’s response to the challenges to centralized Church authority included convening the First Vatican Council in 1870; one of the outcomes of Vatican I was the definition of papal infallibility. In the climate of ecclesial centralization, Leo XIII was concerned with centralizing thought within the Church. He did this by declaring Thomas Aquinas the theologian of the Church in Aeterni Patris (1879) and using neo-Thomism as “an objective and universal basis for reflection” in his subsequent encyclicals.

Rerum Novarum was published in 1891. The encyclical represents a shift in the Church’s engagement with philosophical liberalism, political liberalism, and industrial

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112 Ibid.

113 Ibid., 133.
capitalism. Prior to the papacy of Leo XIII (1878-1903), the Church had “largely rejected the modern liberal philosophy of the European Enlightenment with its derivative movements of liberal democracy and industrial capitalism.”\footnote{114} Leo XIII, alternatively, sought to engage and reform the social, political, and economic thought and activity of his time.\footnote{115}

Leo XIII began \textit{Rerum Novarum} by calling attention to the poverty of the masses, which he contrasts with “the enormous fortunes of individuals” (1)\footnote{116} Leo XIII expressed concern about the “the misery and wretchedness” (2) experienced by the poor as well as “a general moral deterioration” in society as a whole (1). He identified the causes of extreme poverty as “the callousness of employers,” “the greed of unrestrained competition,” “rapacious usury,” “the custom of working by contract, and the concentration of so many branches of trade in the hands of a few individuals, so that a small number of very rich men have been able to lay upon the masses of the poor a yoke little better than slavery itself” (2). All four causes of poverty Leo XIII identified seem to point toward structural problems in the economy, but his proposals for addressing these causes of poverty show that he understood these causes to be rooted in the relationships of economic agents. The solutions to the problem of poverty, then, are bound-up with Leo XIII’s social vision wherein the stratification of economic classes is a matter of fact and is morally beneficial, but neglect of the duties that each class has to the other is the source of the moral problem of poverty.

\footnote{114} Joe Holland, \textit{Modern Catholic Social Teaching: The Popes Confront the Industrial Age 1740-1958} (New York: Paulist Press, 2003), 2.

\footnote{115} Cf. Holland, \textit{Modern Catholic Social Teaching}, 2.

\footnote{116} Citations of the social encyclicals are by paragraph number. I have included these in the body of the text.
2.2.1 The Problem of Callous Employers

While the problem of “callous employers” could be addressed through changing the structure of the employer-employee relationship or through legislating the responsibilities of employers to employees, Leo XIII’s discussion of employer-employee relationships both reinforced existing structural inequalities and indicated that he thought the problem of extreme poverty could be solved via the education of each class about its roles and responsibilities. A close reading of Leo XIII’s discussion of employer-employee relationships shows that one of his driving concerns was maintenance of the social order. His concern for order was informed by the political upheavals, such as the French and American Revolutions, of not too distant memory, and their accompanying implications for the role of the Church. Leo XIII’s concern for maintaining order took the form of supporting social, political, and economic hierarchies, which include fixed roles for rich and poor and which serve to support rather than challenge economic inequality.

Leo XIII stated that it is a “great mistake” to suppose that “class is naturally hostile to class; that rich and poor are intended by nature to live at war with one another” (15). He was criticizing the notion of class conflict in Marxism by means of natural law. Leo XIII went on to assert that it is in fact “ordained by nature that these two classes [rich and poor] should exist in harmony and agreement, and should as it were, fit into one another, so as to maintain the equilibrium of the body politic. Each requires the other; capital cannot do without labor nor labor without capital. Mutual agreement results in pleasantness and good order; perpetual conflict produces confusion and outrage” (15). Leo XIII assumed that the roles of rich and poor, albeit not necessarily the occupiers of
the roles, were fixed and, as such, so long as each class understood and fulfilled its duties to the other, the demands of justice would be met.

The laborer, according to Leo XIII, is obliged to “carry out honestly and well all equitable agreements freely made, never to injure capital, not to outrage the person of an employer; never to employ violence in representing his own cause, nor to engage in riot and disorder; and to have nothing to do with men of evil principles, who work upon the people with artful promises, and raise foolish hopes which usually end in disaster and repentance when too late” (15). The complementary duties of the employer include “that they must respect in every man his dignity,” ensure that employees have time for religious duties, protect employees from corrupting influences, refrain from taxing employees beyond their strength, refrain from employing persons “in work unsuited to their sex or age,” and justly compensate employees via a living wage, which he understood as “enough to support the wage earner in reasonable and frugal comfort” (16-17; 33-4).

These roles, as described by Leo XIII, are rigid, with the employer exercising a paternalistic power over the employee. While adherence to the guidelines for the correct moral behavior of an employer may address the problem of “callous employers” that Leo XIII identified as a cause of poverty, these guidelines do little to challenge economic inequality. To the contrary, Leo XIII’s description of the roles serves to reinforce the idea that economic inequality is natural, and that which is natural is unchallengeable and unchangeable. This is not to say that a living wage would not improve the conditions of the poor. A living wage might even mitigate the gap between rich and poor by redistributing profits. But to truly address economic inequality, a minimum living wage
would need to be calculated in relationship to a maximum living wage. Further, workers would need to be a part of the process of determining maximum and minimum living wages because an element of the structure that enables economic inequality to persist is the paternalistic relationship between employer and employee in which decision-making power is concentrated in the employer.

2.2.2 The Problem of Unrestrained Competition

The second cause of extreme poverty identified by Leo XIII is “the greed of unrestrained competition” (2). The effects of greed, for Leo XIII, were demonstrated in employers’ understanding and treatment of workers. He was critical of “grasping speculators, who use human beings as mere instruments for making money” (33). Human beings cannot be treated as instruments, Leo XIII argued, because of their inherent dignity as children of God, who are, “all and each,” redeemed by Christ and destined to the same end, “which is God himself” (21).

Here, Leo XIII, began to articulate a theological anthropology that challenges economic inequality. If human beings are “all and each” equal in their dignity because of their creation, redemption, and destiny, how are economic inequalities justified? As we will see, however, Leo XIII failed to develop a theological anthropology that connects the spiritual equality of human beings with socio-economic outcomes. This is because for Leo XIII, spiritual equality was made manifest in the afterlife.

Further, while Leo XIII interprets unrestrained competition as an attitudinal problem rooted in a capitalist’s greed, unrestrained competition is also a structural problem in that institutional rules and intellectual infrastructure encourage unrestrained competition in a capitalistic economic system. That is, unrestrained competition is
valued. In a capitalist economic system, competition is thought to keep prices low. The institutional rules of the system encourage competition.

2.2.3 The Problems of Rapacious Usury and the Right Use of Money

The third cause of extreme poverty identified by Leo XIII is “rapacious usury.” Interestingly, Leo did not go on to criticize the lending of money at exorbitant rates of interest per se, but used the idea of usury as an entree to a discussion of the right use of money. Leo XIII made a distinction between “a right to the possession of money” and “a right to use money as one pleases” (19). The right to the possession of money is rooted in the natural right to private property (5; 7-8). The right to use money, however, is, according to Leo XIII governed by the duty of Christian charity (19).

Leo XIII articulated a three-tiered framework governing the right use of money. First, one is permitted to keep what is necessary to provide for oneself and one’s household. Second, one is also permitted to keep “what is reasonably required to keep up becomingly his condition in life” (19). Third, “when necessity has been supplied, and one’s position fairly considered, it is a duty to give to the indigent out of that which is left over” (19).

The three-tiered framework, while having the potential to alleviate extreme poverty, supports rather than challenges economic inequality. The provision for keeping that which is “reasonably required” to keep up one’s station in life acknowledges and supports differences in social and economic status. In order for such a framework to limit

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117 The Roman Catholic tradition had a long history of prohibiting usury. By the early nineteenth century, in an accommodation, perhaps, to the emergence of an industrialized economy, the Roman Catholic tradition affirms that within the context of the tradition, interest allowed by State law is now also understood to be morally permissible. For a comprehensive analysis of Roman Catholic thought on usury, see John T. Noonan, The Scholastic Analysis of Usury (Cambridge: Harvard University Press, 1957).
economic inequality, there needs to be a corresponding conception of “enough,” which is antithetical to contemporary (even contemporary to Leo XIII) capitalism.118

2.2.4 Leo XIII’s Theological Anthropology and Supernatural Understandings of Creation and Salvation

Leo XIII’s acceptance and promotion of a socio-economic hierarchy is rooted both in his understanding of social order, and, perhaps more fundamentally in his theological anthropology. Leo XIII did not develop the idea that economic inequality may be a moral or even a social problem. In fact, he went to lengths to justify existing economic differences:

Let it be laid down in the first place that humanity must remain as it is. . . . There naturally exist among mankind innumerable differences of the most important kind; people differ in capability, in diligence, in health, and in strength; and unequal fortune is a necessary result of inequality in condition. Such inequality is far from being disadvantageous either to individuals or to the community; social and public life can only go on by the help of various kinds of capacity and the playing of many parts, and each man, as a rule, chooses the part which particularly suits his case (RN 14).

Leo XIII’s failure to connect spiritual equality with socio-economic outcomes can be attributed in part to his social theory. Leo XIII understood society to be “a hierarchical organism in which there are different roles and functions to fulfill, but in which all will work for the common good of all.”119 As such, “inequalities and some hardships connected with them will always be a part of human existence in this world.”120

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120 Ibid.
Leo XIII’s understanding of social order influenced his thinking about the human person, leading to an inadequate theological anthropology, including inadequate understandings of the creation, embodied life, and salvation of human beings. Leo XIII argued that human beings are equal in their opportunity to access virtue (20), equal in that “they all have the same end, which is God himself” (21), and equal in that all human beings’ souls are made in the image and likeness of God (32). At the same time, he understood physical and psychological inequalities and the social and economic inequalities that follow as natural and necessary (14).

Physical and psychological inequalities were unimportant for Leo XIII because of his understanding of creation and salvation. Leo XIII understood human beings to be created not “for the perishable and transitory things of earth, but for things heavenly and everlasting” (18). He argued that Christ, “when he redeemed us . . . took not away the pains and sorrows which . . . make up the texture of our moral life, [rather] he transformed them into motives of virtue and occasions for merit” (18). Thus for Leo XIII, socio-economic inequalities were relevant only in that they may serve as “motives for virtue and occasions for merit” (18). Human beings may have “money and the other things which men call good and desirable . . . in abundance or we may want them all together; as far as eternal happiness is concerned, it is no matter; the only thing that is [morally] important is to use them aright” (18).

Leo XIII’s supernatural understanding of creation and salvation offers a minimal challenge to economic inequality via his connection of salvation to the moral imperative of the right use of goods. That is, poverty ought to be lessened by following the principle of right use, which would necessitate distribution of superfluous goods of the well-off to
the poor, and this may also have the effect of reducing economic inequality. But, at the same time, the second-tier provision of the right use norm, which affirms as morally permissible keeping that which “is reasonably required to keep up becomingly” one’s station in life, reinforces rather than challenges other existing economic inequalities.

2.2.5 The Problem of Working by Contract

The fourth cause of extreme poverty Leo XIII identified is the “custom of working by contract.” Like Leo XIII’s criticism of “callous employers” his identification of contracts as a cause of poverty, located the causes of and solutions to poverty in the employer-employee relationship. Leo XIII, to be clear, did not intrinsically object to contracts. He identified contracts as a cause of extreme poverty because of the potential for abuse in contractual arrangements on the part of the employer, which is made possible because of the employer’s economic power. Leo XIII was particularly concerned about contractual agreements regarding the setting of wages. He cautioned the rich, stating that they “must religiously refrain from cutting down the workman’s earnings, either by force, fraud, or by usurious dealing” because “the poor man is weak and unprotected, and because his slender means should be sacred in proportion to their scantiness” (17). He went on to argue that natural law requires employers to pay employees enough to live in “reasonable and frugal comfort” (34).

Leo XIII hoped that the moral requirements of fair contracts could be worked out between employers and employees. He hoped and believed that if each group understood “the precepts of duty and the laws of the Gospel” that “harmony” would persist “among the divergent interests and various classes that compose the State” (41). He endorsed workers’ associations that provide aid in times of crisis, illness, and death, and that
“enable [workers] to obtain honest and profitable work” (36; 41), but also affirmed the right of the State to prevent associations that are “evidently bad, unjust, or dangerous to the state” (38), which in effect reinforces economic inequality by emphasizing State power to maintain the economic status quo.

Leo XIII’s persistent hope that if people knew and understood “the precepts of duty and the laws of the gospel,” then they would act justly, is consistent with the optimism regarding the potential for social progress that characterized philosophical and theological thought in the late nineteenth and early twentieth centuries. Regarding the specific issue of contracts, Leo XIII’s optimism that employers and employees could and would work out fair contracts that compensated laborers justly, is, like the norm of right use, only a minimal challenge to economic inequality. If, and we know historically that this did not happen, employers did pay laborers enough to live in “reasonable and frugal comfort” this would have, importantly, improved the condition of many impoverished workers. At the same time, providing a minimal wage floor does little to challenge economic inequality if profits continue to expand and wealth continues to accumulate in the hands of a few.

2.2.6 The Problem of the Concentration of Trade in the Hands of a Few

In identifying “the concentration of so many branches of trade in the hands of a few” as a means for the “very rich” to “lay upon the masses of the poor a yoke little better than slavery” (2), Leo XIII pointed toward the structural problem of the inequality of economic power inherent in monopolies. Thus Leo XIII made an important connection between economic inequality and poverty: inequalities in economic power
enable the powerful to exploit the powerless and, as such, inequalities of economic power are a cause of extreme poverty.

Leo XIII’s identification of the structural problem of the concentration of economic power in the hands of a few because of the monopolistic control of trade as a cause of extreme poverty could have led him to propose legislative solutions to the problem of poverty. His distrust of the State, however, precluded any such proposal. Instead, he encouraged an expansion of the ownership of private property by the poor, which is premised upon the working person earning adequate wages that enable him to save and “put by a little property” (35). Conceptually, this is Leo XIII’s best effort at challenging economic inequality. He hypothesized, “If working people can be encouraged to look forward to obtaining a share in the land, the result will be that the gulf between vast wealth and deep poverty will be bridged over” (35). This vision, however, falls short because the premise upon which it is based, adequate wages for saving, is not realized.

2.2.7 Concluding Reflections on Rerum Novarum

In conclusion, while Leo XIII identified the dramatic disparities of wealth between rich individuals and the poor masses and also hinted at a concern regarding inequality of economic power, he did not develop a critique of inequalities of income, wealth, or economic power per se. His greater concern was to call attention to and propose strategies for eliminating the misery associated with abject poverty. A critique of inequalities of income, wealth, and power was inhibited by Leo XIII’s acceptance of an unequal, stratified social order and his belief that equality would be realized in the after life. A robust critique of inequalities of income, wealth, and economic power would
have been aided by a more imminent theology as well as a more developed exposition of
the principle of the universal destination of goods, i.e., the principle that the goods of the
earth are intended to support everyone.

2.3 Quadragesimo Anno

Quadragesimo Anno, issued in 1931 to commemorate the fortieth anniversary of
Rerum Novarum, was written in the wake of the First World War, in the midst of a severe
worldwide economic depression, and during the rise of fascism in Italy and Nazism in
Germany. Relations between the Vatican and the Italian government of Mussolini were
strained.\textsuperscript{121}

Ecclesiastically, authority for the formulation of Catholic social teaching
remained centralized in the Vatican. As Richard Gaillardetz notes, paragraph seven of
Quadragesimo Anno is evidence that this is the case.\textsuperscript{122} Here Pius XI asserted that when
faced with grave social problems in the nineteenth century:

\begin{quotation}
The eyes of all . . . turned toward 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
out to them (QA 7).
\end{quotation}

Pius XI envisioned his role as picking up where Leo XIII left off in terms of diagnosing
and proposing cures for the social ills of the early twentieth century.

\textsuperscript{121} Christine Firer Hinze, “Commentary on Quadragesimo Anno,” in Modern Catholic Social

\textsuperscript{122} Richard R. Gaillardetz, “The Ecclesiological Foundation of Modern Catholic Social Teaching,”
in Modern Catholic Social Teaching, ed. Kenneth R. Himes, OFM (Washington D.C.: Georgetown
2.3.1 *The Problems of Economic Power and Domination*

In *Quadragesimo Anno*, Pius XI went further than Leo XIII in challenging inequalities of income and wealth. He was concerned particularly about inequality of economic power, and because he understood the accumulation of wealth in the hands of a few to lead to economic domination or an unjust exercise of economic power by those few (105), he challenged inequality of wealth more directly than Leo XIII. Economic domination was problematic for Pius XI, primarily because of its consequences for social order. He was concerned that the concentration of economic power in the hands of a few leads to a “threelfold struggle for domination. First, there is the struggle for dictatorship in the economic sphere itself; then the fierce battle to acquire control of the State, so that its resources and authority may be abused in the economic struggles. Finally, [there is] the clash between the States themselves” (108). Pius XI feared that “economic dictatorship” compromises the integrity of the State, and, as such, the State, instead of promoting justice and the common good, becomes a pawn in service to those with economic power (109).

Pius XI identified “unrestrained free competition which permits the survival of those only who are the strongest” as the cause of the concentration of economic power in the hands of a few (107). He went on to note that “this often means those who fight most relentlessly, who pay the least heed to the dictates of conscience” are those that end-up accumulating economic power (107). Pius XI’s criticism of economic domination implicitly challenges inequality of wealth. If a concentration of wealth in the hands of a few has the negative consequence of economic domination, which leads to corruption of the State, the opposite circumstance, a more equal distribution of wealth, has the
potential, it seems, to lessen or even solve the problem of economic domination, which, in turn would support the integrity of the State.

The remedies for the problem of economic domination that Pius XI proposed include attention to the “dual character, social and individual, of capital and labor,” regulation of the relations between capital and labor “according to the laws of strict justice, called commutative justice, supported . . . by Christian charity,” regulation of free competition by the State, and coercive measures, again enforced by the State, that “make all human society conform to the requirements of the common good, that is, the norm of social justice” (110).

2.3.2 The Criteria of the Universal Destination of Goods and the Right Use of Property

Toward the end of relative equality of economic power, Pius XI affirmed the right to own private property, stressing the “twofold aspect of ownership, which is individual and social” (45). Here, he referenced the traditional Catholic criteria of (1) the universal destination of goods (the idea that God intends the goods of the earth to be used to promote the human flourishing of all); and (2) right use of property (45-7). His emphasis, however, was on right use.

Pius XI, expanding Leo XIII’s understanding and description of the role of the State, specified that it is the “function of the government, provided that the natural law and divine law [are] observed,” to define in detail the requirements of distributive justice as they pertain to “what is licit and what is illicit for property owners in the use of their possessions” (49). He was careful to assert that the State does not have the right to abolish private property because “the right to possess private property is derived from nature” (49). At the same time, however, Pius XI presented a much more congenial
picture, as compared with that of Leo XIII who was suspicious of the State overstepping its boundaries, of Church-State relations, in which the State “brings into harmony” the right of private ownership with “the interests of the common good” (49).

Like Leo XIII, Pius XI also set guidelines for the distribution of superfluous income as a means to remedying economic inequality. Pius XI, like Leo XIII, adhered to the three-tiered framework for distribution, arguing that one may maintain that which is necessary to meet one’s own basic needs and the needs of one’s family as well as that which is required “in order to live as becomes his station” (50). Pius XI nuanced the requirement of distributing superfluous income to include the investment of such income in “developing favorable opportunities for employment” (50). The guidelines Pius XI proposed regarding the distribution of superfluous wealth, do more to support harmony between human beings and classes of human beings, than to challenge inequality of economic power. The guidelines for the distribution of superfluous wealth, in fact, support inequality of power by reiterating the norm of keeping what is necessary to maintain one’s station in life, which, rather than challenging economic inequality, reinforces existing socio-economic hierarchies.

2.3.3 The Contributions of Labor and Capital to the Production of Wealth and Proposals for a More Equitable Distribution of Profits

While Pius XI’s account of the distribution of superfluous goods does little to challenge inequality of power, his understanding of the contributions of labor and capital to the production of wealth serves to challenge inequalities of income, wealth, and power by supporting a more equitable distribution of profits. Arguing in support of the significant contributions of labor to the production of wealth, Pius XI posed the rhetorical
question: “Is it not indeed apparent that the huge possessions which constitute human wealth are begotten by and flow from the hands of the workingman” (53)? He went on to argue that capital has long been able to “appropriate to itself excessive advantages. It claimed all the products and profits and left to the laborer the barest minimum necessary to repair his strength and to ensure the continuation of his class” (54). Pius XI was equally critical of theories holding “that all products and profits, excepting those required to repair and replace invested capital, belong by every right to the workingman” (55). Like Leo XIII, Pius XI assumed a distinction between labor and capital, one that has historically entailed conflict, and sought harmony between them.

Pius XI, in arguing for a more just distribution of profits, again appealed to the principle of right use, stating “wealth . . . must be distributed among the various individuals and classes of society [so that] the common good of all . . . [is] promoted” (57). He went on to assert that “one class is forbidden to exclude the other from a share in the profits” (57). Applying the principle of right use to the distribution of profits challenges economic inequality because this means of analysis establishes a foundation for arguing about distribution of the whole. That is, unlike the three-tiered framework for distributing superfluous wealth, in which the wealthy retain their social status and are only required to share their excess, a discussion of the equitable distribution of profits has the potential to significantly redistribute wealth because social status is no longer a factor; rather, the criterion for distribution is shifted to contribution to the production process. Importantly, for the maximum amount of economic equality to be achieved via this application of the principle of right use, workers, managers, and owners would have to be accorded equal status in conversations about the distribution of profit.
One means of achieving an equitable distribution of profits and hence lessening inequality of income and wealth, which Pius XI highlighted, is a just wage. Pius XI affirmed the validity of the wage contract (64) and argued that wages should be determined based on three criteria: what is needed to support the workingman and his family; what a business can afford to pay; and the promotion of full employment (71-74). In establishing these criteria, Pius XI sought to harmonize the interests of labor and capital. Workers, he argued, should be sufficiently compensated so as to be able to support their families (71). At the same time, Pius XI argued that “it is unjust [for workers] to demand wages so high that an employer cannot pay them without ruin” (72). Third, wages should be set so as to “offer the greatest number of opportunities of employment” (74). Pius XI’s proposal for just wages challenges inequality of income and wealth, by indicating that profits should serve workers and owners, labor and capital.

Another means to achieving an equitable distribution of profits is a modification of the structure of the wage contract itself. Pius XI argued that the wage contract should be modified so that it is more a “contract of partnership . . . [in which] the workers and executives become sharers in the ownership or management, or else participate in some way in the profits” (65). Pius XI’s proposal for worker participation in ownership and/or management of businesses challenges inequality of power, not only by challenging the distribution of profits but also by challenging how decisions about distribution are made.

2.3.4 The Principle of Subsidiarity

Pius XI, like his predecessor Leo XIII, was concerned with social order. He sought to create harmony between classes and “the various ‘ranks’ or groups of society”
His proposals for institutional reforms, aimed at restoring social order, serve both to support and to challenge inequality of income, wealth, and power.

While prescribing a larger role for the State in ensuring economic justice, Pius XI also set down the principle of subsidiarity in order to delimit the role of the State both in its local and national forms and to distinguish the role of the State from other, non-governmental organizations. The principle of subsidiarity “assumes the natural right to associate and to organize . . . [and ] affirms that there is nothing done by a higher or larger organization that cannot be done as well by a lower or smaller one.”

Pius XI employed the principle of subsidiarity in developing the idea of “intermediary groups,” which would have the responsibility for “the care and expediting of business and activities of a lesser moment, which otherwise become . . . a source of great distraction” for the State. Pius XI’s discussion of vocational groups or employer-employee councils illustrates the ways in which the principle of subsidiarity and the intermediary groups that result from employing the principle function to create harmony between social classes and as such promote social order.

Pius XI observed labor and capital as divided into “two classes, as into two camps, and the bargaining between these parties transforms this labor market into an arena where the two armies are engaged in combat” (83). He believed that this division of labor and capital could be overcome by organizing men into “functional groups” which organize men “not according to the position that they occupy in the labor market,


124 Vocational groups and employer-employee councils are helpful terms used by Marvin L. Krier Mich to characterize the groups of employees and employers described by Pius XI. See Mich, Catholic Social Teaching and Movements (Mystic, CT: Twenty-Third Publications, 1998), 82.
but according to the diverse functions which they exercise in society” (83). Pius XI was optimistic that such vocational groups, operating in a two-tiered framework, would come together to promote the common good. Groups in the first tier, would consist of employers and employees in the same trade who “would mutually regulate working conditions, wages, and production with a given territory.”\(^{125}\) At the second level, “vocational groups representing different professions would meet and mutually regulate trade relations and production for the common good of society as a whole.”\(^{126}\)

While Pius XI’s vision for cooperation between labor and capital is laudable, his proposal for employer-employee cooperation via vocational groups seems to lack an adequate analysis of power. How would power be shared in such groups? Across groups? How would conflicts be resolved? Pius XI seemed to realize that there may be competing interests in the groups that at times will necessitate “separate deliberation” (85). Thus, the idea of employer-employee councils challenges inequality of power by proposing more equal contributions of labor and capital to decision-making within industries and the business sector as a whole. At the same time, without adequate provisions for ensuring power sharing within such groups, employer-employee councils may serve merely to reinforce and affirm existing inequalities.

2.3.5 *The Correction of Morals*

In addition to the institutional changes Pius XI proposed as remedies to the problems of economic domination, he also believed that a “correction of morals” was

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\(^{126}\) Ibid.
essential (77, 98). He argued that, because economic activities have a moral dimension, “the proper ordering of economic affairs cannot be left to the free play of rugged competition,” an idea which is rooted in an individualistic ethic (88). Pius XI understood disordered affections, especially “the thirst for riches and temporal possessions,” to be a cause of economic injustices such as domination and inequality (132). The moral remedy, then, is cultivation of the virtues of social justice and social charity (88).

Justice, Pius XI argued, will be embodied in institutions. His description of the structure of employer-employee councils is an example of institutional embodiment of the principle of justice. The cultivation of charity will facilitate “a union of hearts and minds” (137). Pius XI envisioned charity transforming the hearts and minds of the rich so that they “and others in power will change their former negligence of their poorer brethren into solicitous and effective regards” (137). Workingmen, conversely, “will lay aside all feelings of hatred or envy . . . they [will] cease to feel weary of the position allotted them by divine providence in human society; they will become proud of it, well aware that every man by doing his duty is working usefully and honorably for the common good, and is following in the footsteps of him, who, being in the form of God, chose to become a carpenter among men, and to be known as the son of a carpenter” (137). Here, Pius XI’s social vision seems very similar to that of Leo XIII: social roles are hierarchically fixed and the solution to economic disparities is not a change in the structure of social and/or economic roles, but rather, that those occupying such roles (1) accept their fate; and (2) perform the duties that are incumbent upon them.

Pius XI’s appeal to the virtues of justice and charity does, however, have the potential to challenge inequality of income, wealth, and power. As we have seen,
principles of commutative justice can challenge inequality of income by guiding construction of the wage contract so as to provide fair and adequate compensation for workers and also so as to give workers a voice in determining the distribution of profits (a structural change). The cultivation of charity, in the broad sense of love of neighbor, could also challenge inequality of income and wealth, by challenging the worldview and anthropology that fosters economic domination (an attitudinal change). Pius XI’s discussion of justice and charity, however, unfortunately reinforces inequality of power, wealth, and income by stating that the existing socio-economic order and individual’s and groups’ positions in it, are the result of “divine providence” (137).

2.3.6 Concluding Reflections on Quadragesimo Anno

In conclusion, Pius XI was concerned about inequality of economic power. He recognized that inequality of wealth contributed to inequality of economic power. Because Pius XI recognized the problem of economic domination, he supported and argued in favor of more participation by labor in the ownership and management of businesses. If laborers are also owners, it should follow that profits will be distributed more equitably between capital and labor, which would lessen inequality of income and wealth as well as inequality of economic power.

Pius XI’s critique of inequality of power is, however, weakened by his affirmation of a stratified socio-economic order, a vision he inherited from Leo XIII and his predecessors. Further, Quadragesimo Anno lacks an egalitarian theological anthropology (Pius XI does not attend to theological anthropology at all in this document, implying that he may have accepted Leo XIII’s) and a robust articulation and application of the
principle of the universal destination of goods. Both are essential elements of a Catholic theology of equality. Both will emerge in the encyclicals of John XXIII.

2.4 *Mater et Magistra*

*Mater et Magistra* was issued in 1961. This was a time when the world and the Church were aware that violence could escalate to nuclear war and catastrophic destruction. The Second World War had ended fewer than twenty years ago after atomic bombs were dropped on Hiroshima and Nagasaki in August 1945. The Korean War had begun in 1950 and ended in 1953. The Berlin wall had been erected in August 1961. By 1960, France had tested its first atomic bomb and the United States had sent 3,500 troops to Vietnam.

The 1950s and 1960s were also times of increased optimism about and commitment to social progress. The United Nations Declaration on human rights was issued in 1948. By the mid 1950s, the civil rights movement in the United States was underway. In 1960 the lunch-counter sit-ins began in North Carolina, and in the summer of 1961 the Freedom rides began. The late 1950s and 1960s were also a time of hope and optimism regarding scientific progress. In 1961, Soviet Yuri Gagarin became the first person in space. A few weeks later, Alan Shepard became the first American in space.

Influenced by hope and optimism about social and scientific progress as well as by concern for the potential devastation of nuclear war, John XXIII issued *Mater et Magistra* in order to show how social and scientific progress could ameliorate disparities

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127 For more discussion of John XXIII’s optimism, see Donal Dorr, *Option for the Poor: A Hundred Years of Catholic Social Teaching*, (Maryknoll, NY: Orbis Books, 1992), 115-123.
in the socio-economic sphere. Two years later, he issued *Pacem in Terris* in order to show how society was evolving and how it could continue to evolve politically.

2.4.1 *The Problem of Increasingly Pronounced Imbalances*

In *Mater et Magistra*, John XXIII identified “increasingly pronounced imbalances” as one of the significant socio-economic problems he planned to address in the encyclical (48). Edward P. DeBerri et. al. go so far as to argue that the purpose of *Mater et Magistra* was to respond to severe imbalances existing between rich and poor.\(^{128}\) Marvin L. Krier Mich argues in a different yet complementary vein that the purpose of the encyclical is “to shore up our personal human dignity by linking our work with our spirituality.”\(^{129}\) A driving force behind John XXIII’s analysis is his theological anthropology, which influenced his concern about inequalities between rich and poor.

The imbalances John XXIII was concerned about were imbalances of “wealth and social advancement” (150) between “agriculture on the one hand and industry and services on the other; between the more and the less developed regions within countries; and . . . on a worldwide scale, between countries with differing economic resources and development” (48). Thus, on the one hand (and this is new), John XXIII challenged inequality of wealth at the macro-economic level, focusing more on imbalances between economic sectors and geographic regions than on micro-economic inequalities that exist between employers and employees. At the same time, he was concerned about persisting inequities between “workers and management in productive enterprises” (122), and as

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\(^{129}\) Mich, *Catholic Social Teaching and Movements*, 98.
such, he reiterated much of Leo XIII and Pius XI’s discussion of the problem of inequality in employer-employee relationships. Both of these are structural critiques.

2.4.2 The Problems of Inadequate Compensation for Workers and Inequitable Distribution of Profits

John XXIII identified several causes of inequality of wealth, which can be categorized in terms of micro- and macro-economic causes. The first micro-economic cause he identified was inadequate compensation for workers, which he further attributed to “the wealthy and conspicuous consumption of a few” at the expense of “the needy” (69) and “great . . . remuneration for the performance of some task of lesser importance or utility” while “whole classes of decent and hard-working citizens . . . receive too low a payment . . . and one that does not correspond to the contribution made to the community or to the revenues of the undertakings in which they are engaged, or to the national income” (70). In challenging the distribution of income, John XXIII challenged inequality of wealth by arguing that fruits of the production process should be divided differently. Importantly, he alluded to the inequitable remuneration between those who work and those who receive compensation for “lesser tasks,” such as investment via stock ownership, which require no work and are richly rewarded.

The second micro-economic cause John XXIII identified as a cause of inequality of wealth was capital’s appropriation and distribution of profits to itself. He argued that “today, more than in the times of our predecessor, ‘every effort should be made that, at least in the future, only an equitable share of the fruits of production accumulate in the hands of the wealthy, and a sufficient and ample portion go to the workingmen’” (77). In calling into question both the appropriation and distribution of profit, John XXIII
challenged inequality of wealth. If labor had more of a voice in appropriating and distributing profit, it is probable that profit would be distributed more equally among capital and labor.

John XXIII alluded to a relationship between human character and self-understanding and the micro-economic causes – inadequate compensation for workers and capital’s appropriation and distribution of profits to itself – of inequality of wealth. That is, in his discussion of the difficulties of applying Church teaching, he argued that it is difficult to put Church teaching into practice regarding social affairs because (1) human beings have an “instinctive and immoderate” love of their own interests; and (2) there exists a “widely diffused” and seemingly accepted materialistic philosophy of life (229). I raise the issue here because John XXIII implied that human character or human nature, as well as accepted philosophies of life, contribute to inequality of wealth by fostering understandings of human nature and human dignity that permit unjust distribution of profits. Thus while he was optimistic about human nature and human capacities for goodness to motivate social change, he was not naïve. He recognized sin, but he was optimistic about wider society’s capacity for recognizing and moderating it too.

2.4.3 The Problem of Changes in Productive Sectors

John XXIII, unlike Leo XIII and Pius XI, also identified changes in productive sectors as macro-economic causes of economic inequality. Particularly, he identified a depressed agricultural sector as causing disparity between the agricultural and industrial sectors of the economy. John XXIII was concerned that persons were abandoning agricultural work as a vocation because the collective standard of living in rural areas,
especially among those working in agriculture, was not keeping pace with the collective standard of living in industrial areas.

John XXIII’s concern for depression in the agricultural sector of industrialized nations was related to his concern about inequality of wealth between industrialized and non-industrialized nations. John XXIII believed that wealth, while it may not be distributed equitably, arose through industry. He noted that the causes of inequality of wealth between nations “are to be found in the primitive state of the economy” (163). That is, non-industrialized countries are “primitive” and hence poor, while industrialized nations as a whole are wealthy.

John XXIII located solutions for the micro and macro problems of inequalities in the private and public sectors as well as intermediary institutions. While private initiative took precedence over public intervention for John XXIII, he argued that “recent developments of science and technology provide additional reasons why, to a greater extent than heretofore, it is within the power of public authorities to reduce imbalances” (54). Here, he reiterated that he was concerned about imbalances between “various sectors of economic life . . . between different regions of the same nation . . . [and] between different peoples of the world as a whole” (54). Thus, the State, it seems is, for John XXIII, the proper institution to ensure equity at the macro-economic level.

2.4.4 The Roles of the State, Intermediary Institutions, and the Private Sector in Reducing Inequalities

The roles John XXIII prescribed for the State for the purpose of reducing inequalities of wealth and social advancement included supporting artisan and cooperative associations (84, 88), effecting improvements in rural areas (127), and aiding
developing nations by providing “aid designed to promote sciences, technology, and economic life” (165). Because artisan associations help craftsmen adapt to “new conditions . . . [arising] from advances in science and technology [and] from changing consumer needs and preferences,” John XXIII argued that the State should support them by making “special provision for them in regards to instruction, taxes, credit facilities, social security, and insurance” (88).

The second role John XXIII envisioned for the State was effecting improvements in rural areas regarding “highway construction; transport services; marketing facilities; pure drinking water; housing; medical services; elementary trade, and professional schools; things requisite for religion and for recreation; [and] furnishings and equipment needed in the modern farm home” (127). John XXIII imagined that such improvements would help rural areas keep pace with industrialized areas, and, as such lessen the inequality of social advancement he perceived to be developing between the two.

John XXIII also proposed that the State, in order to improve economic life in the agricultural sector, ought to “give heed and take action in the following matters: taxes and duties, credit, insurances, prices, the fostering of requisite skills, and . . . improved equipment for rural enterprises” (131). More specifically, taxation should be based on ability to pay and special note should be taken of the delay and risk associated with rural income (132-3). The characteristics of delay and risk also affect available credit, and, as such, John XXIII argued that the State ought to intervene to “make special provision for agricultural financing” and to establish “banks that provide capital to farmers at reasonable rates of interest” (134).

130 John XXIII reiterates these responsibilities of the State in paragraph 64 of *Pacem in Terris*. 
John XXIII also argued that those working in the agricultural sector need insurance to cover both agricultural output and farmers and their families. He perceived social security and insurance as means of “distributing national income” and as such means of reducing imbalances between “various classes of citizens” (135). John XXIII did not work out the specifics of price protection, but he argued that agricultural prices ought to be protected so that farmers could earn a decent livelihood and that agricultural products, in that they are “destined especially to satisfy the basic needs of men,” should be affordable for all (140).

The types of intermediary institutions John XXIII discussed include professional organizations (85-90; 146) and mutual aid societies (146). John XXIII envisioned professional associations functioning to educate artisans and farmers, both nationally and internationally, about scientific and technological progress in their respective fields (87; 146; 165). In the agricultural sector, professional associations would have the added role of working to protect prices (146). Lastly, John XXIII argued that joining together in professional associations would help farmers (and presumably artisans) gain influence in public affairs (146).

The roles John XXIII prescribed for the private sector included roles for private industry and roles for private individuals. John XXIII, like Pius XI, argued that workers should also be owners of the business for which they work so as to encourage adequate sharing of profits (75-7; 91).

2.4.5 The Relationship between Human Dignity, Spirituality, and Work

At the heart of John XXIII’s proposals regarding the roles of individuals, the State, intermediary institutions, and private industry was his understanding of the
relationship between human dignity, spirituality, and work. Human beings are dignified because of their creation in the image of God (215). Temporal work is sacred because it is “in a way a continuation of the labor of Jesus Christ himself” (259). Human labor, then is not merely performed for the purpose of earning an income. Rather, work is a spiritual endeavor that consists in “performing a service that results in benefit to others” (92). Thus, the State has the obligation to ensure proper opportunities and conditions for work. Intermediary institutions facilitate workers’ self-understandings of their social, moral, spiritual – i.e., human – role. Private industry provides employment for as many workers as possible (79). John XXIII’s understanding of work as a spiritual endeavor challenges inequalities of wealth and social advancement because it provides a stronger theological rationale for Pius XI’s proposal that workers should be partners in ownership and management of the enterprises in which they are employed. The theology of work that John XXIII began to develop in *Mater et Magistra* will be developed more thoroughly by John Paul II in *Laborem Exercens*.

2.4.6 *The Principles of the Universal Destination of Goods and the Right Use of Property*

It is also important to note that John XXIII upheld the teaching of his predecessors concerning the right to own private property and the duties inherent in that right. Like Leo XIII and Pius XI, John XXIII believed that private ownership “safeguard(s) the rights of the human person” while at the same time contributing to “the establishment of right order in society” (111). John XXIII believed that private property safeguards individual rights because private property is necessary for the exercise of economic freedom (109). At the same time, John XXIII reiterated the social
responsibility inherent in private ownership. That is, the right to own private property is subordinate to the universal destination of goods (119). Therefore, owners of private property have a responsibility to use this property both “for their own perfection, and, at the same time, as the minister of God’s providence, for the benefit of others” (119; cf. Rerum Novarum 19). John XXIII stressed the need to extend the use of the right to private property “through all ranks of the citizenry” (113). In so doing he challenged inequality of wealth and social advancement by challenging current patterns of distribution of private property.

2.4.7 Concluding Reflections on Mater et Magistra

Mater et Magistra challenged inequality of wealth and income more than the preceding encyclicals. First, John XXIII, unlike his predecessors, identified inequality of wealth as a problem. Second, he added the dimension of a macro-economic critique. Third, he linked human dignity with a spirituality of work, which has the effect of challenging inequities in compensation and the distribution of profits. Finally, John XXIII’s presuppositions about the equality of human beings, while not fully or systematically articulated in Mater et Magistra, set the stage for the egalitarian theological anthropology explicitly stated in Gaudium et Spes.

2.5 Pacem in Terris

Pacem in Terris (PT) was issued in 1963. The context of PT is much like that of Mater et Magistra. The prospect of nuclear annihilation is still imminent, as evidenced by the Cuban missile crisis of 1962, which brought Russia and the United States to the brink of nuclear war. Hope and optimism about social progress are also still present, as
evidenced by Martin Luther King, Jr.’s eloquent “I Have a Dream” speech during the 1963 March on Washington.

The 1960s were also a time of increased openness and optimism about the world in the Roman Catholic Church. The fruits of this openness and optimism were being realized in the Second Vatican Council, opening in 1962 and closing in 1965. John XXIII’s convening of the Council was a move away from centralized authority in the office of the papacy, to a practice of shared authority with the world’s bishops.

2.5.1 Signs of Social Progress toward Equality

John XXIII’s optimism about social progress is evident in his reading of the signs of the times in *Pacem in Terris*. In this document, unlike Leo XIII’s *Rerum Novarum*, Pius XI’s *Quadragesimo Anno*, or his own *Mater et Magistra*, John XXIII did not point to the numerous causes and effects of poverty and/or inequality, instead he pointed to signs of progress. He noted three distinct characteristics of society in the 1960s, all of which indicated progress. First, John XXIII noted that “the working classes have gradually gained ground in economic and public affairs” (40). He attributed this to workers’ understandings of themselves as dignified persons, not “irrational objects without freedom,” which led workers to claim their rights in the socio-economic and political spheres (40). The second characteristic of modern society noted by John XXIII was the increased participation of women in public life. As with workers, John XXIII attributed this progress to women’s consciousness of their own human dignity, which led them to “demand rights befitting a human person both in domestic and public life” (41). The third characteristic of progress in modern society John XXIII noted was
decolonization, whereby “the inferiority complex which endured for hundreds of thousands of years” because of subjection of one nation to another is fading (42-3).

John XXIII concluded from his observations that “the conviction that all men are equal by reason of their natural dignity has been generally accepted” (44). He went on to argue that it is human beings’ self-awareness of their dignity that makes them aware of both their rights and duties, and it is from this self-awareness that social progress emanates. His tone indicated that he thought he was stating the obvious regarding equal human dignity and that he was merely elaborating the obvious implications of this equality. John XXIII’s convictions about human equality set the stage for the Second Vatican Council to take up this issue more explicitly.

2.5.2 Theological Anthropology and Human Rights

While John XXIII’s extensive discussion of rights and duties does not address the problem of inequalities of income and wealth directly, it establishes important parameters for conditions which facilitate relative equality of these goods. The rights outlined by John XXIII are numerous. I will concentrate on the rights and duties that pertain most directly to economic life. John XXIII first identified rights to subsistence including the rights to “life, to bodily integrity, and the means which are suitable for the proper development of life [including] food, clothing, shelter, rest, medical care, and . . . necessary social services [including] the right to security in case of sickness, inability to work, widowhood, old age, unemployment, or any other case in which [the worker] is deprived of the means of subsistence through no fault of his own” (11). The duties corresponding to these rights, according to John XXIII, include the duty to preserve life and to live becomingly (29). Importantly, these rights and duties establish a floor through
which no one should fall below, but what about the requirements for those who have more than enough?

Like much of John XXIII’s discussion of rights, the right to subsistence is rooted in his theological anthropology. John XXIII notes that “experience has taught us [that] individuals will be found to differ enormously in knowledge, power, talent, and wealth” (87). He went on to argue that these differences are not a justification for domination of the poor by the wealthy, but rather these differences incur on the part of the well-endowed an obligation to others (87). Thus, in answer to my previous question regarding the rights and duties of those who have more than enough, the well-endowed have an obligation – but what is the substance of this obligation? Is poverty still morally beneficial because it provides an opportunity for the wealthy to practice the virtue of charity?

2.5.2.1 The Right to Work

John XXIII implied that subsistence goods will be obtained via work (when a person is physically able) and as such he also identified the right to opportunities for work at living wages without coercion in conditions that are safe (18-20). The corresponding duties to the right to work are interestingly not merely the duty of individuals to work but also the duty of society to strive to “the best of our ability” to create conditions in which human beings not only subsist but flourish (32). The right to work uncoerced in safe conditions at a living wage, while importantly aiming to establish a substantial floor for well-being, does little to challenge inequality of income and wealth themselves. While it is true that if working conditions are safe and workers are well-paid, this implies a better distribution of profit, John XXIII does not place any limit on
the relative gap between rich and poor. Thus, once the conditions of safety and a living wage are met (and I do not want to minimize these goals as they would greatly improve life for many), how then does society regulate the distribution of profit? Once basic needs are met, what are the limits on the gap between rich and poor?

2.5.2.2 The Right to Private Property

John XXIII also reiterated Leo XIII’s and Pius XI’s assertion of the right to private property, including productive goods, and like Leo XIII and Pius XI, John XXIII noted a corresponding “social duty” inherent in the right to private property (21). John XXIII did not explicitly elaborate on the right to private property and its accompanying duties. He may have assumed that he had covered this in *Mater et Magistra* (104-121). He did however indicate that it is the State’s duty to protect and promote the right to private property and other rights (60).

2.5.2.3 The Right to Psychological and Spiritual Well-Being

A third set of rights identified by John XXIII pertained to human beings’ psychological and spiritual well-being. John XXIII argued that “every human being has the right to respect for his person, to his good reputation; the right to freedom in searching for truth” (12). John XXIII envisioned these rights as being connected with the political rights of freedom to express and communicate opinions and the right to be informed truthfully about public events (12). The duties corresponding to these rights include the duty to seek truth “ever more completely and profoundly” (29).
2.5.2.4 The Right to Share in the Benefits of Culture

A fourth set of rights identified by John XXIII pertained to shares in “the benefits of culture” (13). John XXIII argued that all human beings have the right to “a basic education and to technical and professional training in keeping with the stage of educational development in the country to which he belongs” (13). Further education, according to John XXIII, should be based on merit (13). The right to a basic education is again a way of establishing a floor, but not necessarily a means of challenging inequality of income and wealth per se. That is, while a basic education would likely increase the economic well-being of those at the bottom of the income and wealth distribution, making a tremendous difference in persons’ lives, it does not address the issue of relative differences after a basic floor of well-being is established and achieved. Further, John XXIII’s qualification of the level of education necessary relative to the norm in individual countries recognized and implicitly endorsed international disparities in education. This is significant because if income and wealth increase as education increases, international disparities in education would lead to international inequalities in income and wealth.

2.5.2.5 The Right to Freedom

John XXIII also identified the rights to religious freedom, freedom to choose one’s state of life (i.e., whether to marry or not and whether to pursue a religious vocation), the right to meet and associate, and the right to emigrate and immigrate (14-17; 23-5). All of these rights are important preconditions for challenging inequality of income and wealth. But once again, they do not get at the problem of how much inequality is too much.
Lastly, John XXIII discussed political rights. Human beings, again because of their innate dignity, have “the right to take an active part in public affairs and to contribute one’s part to the common good of the citizens” (26). This right is rooted in John XXIII’s theological anthropology, which understands human beings to be social by nature (31). Because human beings are naturally social, they come together to collaborate with one another in civic life.

John XXIII’s discussion of political rights and order is illuminating. On the one hand, he noted that present forms of government are inadequate to promote the worldwide common good (135). On the other, he was committed to gradual and incremental change from within existing social, political, and economic structures (147, 162). These seemingly conflicting notions are reconciled in John XXIII’s suggestion that the United Nations is a structure from within which to expand worldwide public authority (142-5). John XXIII advocated the expansion of its “structure and means” for the purpose of accomplishing its task. As Drew Christiansen notes, John XXIII’s moral framework “trusts in moral suasion and goodwill in public affairs, and seems to ignore the dynamics of competition and conflict in society and in international relations.”

Such a framework may not be sufficient for addressing the problem of inequalities of income and wealth.

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2.5.3 Concluding Reflections on Pacem in Terris

While Mater et Magistra explicitly focused on the problem of inequalities of wealth and social advancement, Pacem in Terris focused more on the problem of political order. What is most important about these documents, however, in thinking about the prospects for an ethic of relative economic equality in the Roman Catholic tradition, is the theological anthropology John XXIII assumed. He believed in a fundamental equality between human beings, as evidenced in his assumption that “the conviction that all men are equal by reason of their natural dignity has been generally accepted” (PT 44). Further, articulating a robust conception of human rights establishes a framework for treating human beings as being equal in their dignity. This framework is necessary but not sufficient for achieving relative economic equality. John XXIII’s assumption of equality is explicitly articulated by the Second Vatican Council in Gaudium et Spes, and this explicit articulation could serve as a foundation for an ethic of relative economic equality and more broadly a theology of equality.

2.6 Gaudium et Spes

Gaudium et Spes was published in the wake of the Second World War (1965), when “two dominant images . . . the atomic bombing of Hiroshima and Nagasaki and the Holocaust . . . still echoed in the contemporary moral consciousness and broader public policy debates.”132 The 1960s were also a time of dramatic tension between the US and the USSR – the Berlin Wall was built in 1961 and loomed as a symbol of the Cold War

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and 1962 was the year of the Cuban missile crisis. The early 1960s also saw the US engage militarily in the proxy war between the US and the USSR in Vietnam.

Economically, the 1950s and 1960s were prosperous years for many in the US, and this prosperity was shared more equally than in the earlier and latter parts of the twentieth century. The 1960s in the US was also a time of increased awareness of and action to achieve racial and gender equality. This is evidenced by passage of the Civil Rights Act of 1964 and the Voting Rights Act of 1965. Recognition of racial equality was also affirmed and realized in the decolonization of Africa in the 1960s.

Ecclesiastically, the Second Vatican Council represented John XXIII’s openness to sharing power and authority with the bishops of the world.

*Gaudium et Spes*, the Pastoral Constitution on the Church in the Modern World, was the only one of the sixteen documents that emerged from the Second Vatican Council that treated the issue of the Church’s relationship with the world outside of itself. *Gaudium et Spes* began its social, economic, and political analysis of the modern world with a self-conscious reading of the signs of the times. Like John XXIII in *Mater et Magistra* and *Pacem in Terris*, the Second Vatican Council (hereafter simply the Council) recognized the positive potential of social, economic, and technical progress, noting that “the human race [has never] enjoyed such an abundance of wealth, resources, and economic power” (4). At the same time, however, the Council also recognized that “a huge proportion of the world’s citizens is still tormented by hunger and poverty, while countless numbers suffer from total illiteracy” (4). The dialectic the Council established between conflicting realities – the capability for progress on the one hand and the lack of realized progress on the other – served to temper the unchecked optimism of *Mater et
Balancing optimism with realism, especially regarding economic progress, had the effect of helping the Council to articulate the challenges and limits of economic progress as well as its potential for lessening inequality. For example, the Council recognized and discussed the spiritual and psychological challenges associated with social, cultural, and economic change (even if that change is, on the whole, progress):

As happens in any crisis of growth, the transformation has brought serious difficulties in its wake. Thus while man extends his power in every direction, he does not always succeed in subjecting it to his own welfare. Striving to penetrate farther into the deeper recesses of his own mind, he frequently appears more unsure of himself. Gradually and more precisely he lays bare the laws of society, only to be paralyzed by uncertainty about the direction to give it (4).

One of the challenges and opportunities associated with progress, according to Gaudium et Spes, is human beings’ greater awareness of inequalities in the world (8). The Council was concerned with a wide variety of inequalities including those of wealth, resources (such as education), economic power, freedom, social status, the benefits of culture, and political participation. Further, the Council was particularly concerned with inequalities between nations, noting that those nations “recently made independent, desire to participate in the goods of modern civilization, not only in the political field but also economically . . . Still they continue to fall behind while very often their dependence on wealthier nations deepens more rapidly” (9).

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133 Cf. Dorr, Option for the Poor, 152.

134 See Gaudium et Spes paragraphs 4.4, 9.3, 17, 31.2, 31.3, 60, 63.4, 63.5, and 75.
2.6.1 Theological Anthropology

The greatest contribution *Gaudium et Spes* made toward challenging inequality (in all the forms about which the Council worried) was the articulation of a theological anthropology that emphasized the essential equality of human beings and the linking of this anthropology with outcomes in the social, political, and economic spheres. Building on the implicit theological anthropology of John XXIII’s *Mater et Magistra* and *Pacem in Terris*, the Council stressed the fundamental equality of human beings: “Since all men possess a rational soul and are created in God’s likeness, since they have the same nature and origin, have been redeemed by Christ, and enjoy the same divine calling and destiny, the basic equality of all must receive increasingly greater recognition” (29). While the constitutive elements of spiritual equality identified by the Council are not new, the connection the Council made between equality and social justice is more extensively developed than in prior papal encyclicals.

The Council noted that while it is true that “all men are not alike from the view of varying physical power and the diversity of intellectual and moral resources, nevertheless, with respect to the fundamental rights of the person, every type of discrimination whether social or cultural, whether based on sex, race, color, social condition, language or religion is to be overcome and eradicated as contrary to God’s intent” (29). The Council, again acknowledging “rightful differences” between men, went on to argue:

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135 Cf. *Rerum Novarum* “all men are children of the common Father, that is of God; all have the same end, which is God himself . . . all and each are redeemed by Jesus Christ” (21).
The equal dignity of persons demands that a more humane and just condition of life be brought about. For excessive economic and social differences between members of the one human family or population groups cause scandal, and militate against social justice, equity, the dignity of the human person, as well as social and international peace (29).

This way of talking about economic and social inequalities represents a shift away from the three-tiered framework for distribution of Leo XIII and Pius XI in which class differences were implicitly affirmed.

Another important aspect of the Council’s theological anthropology is its understanding and articulation of the norm of authentic human freedom, which it contrasted with freedom understood as “a license for doing whatever [one] pleases” (17). Authentic freedom “demands that [human beings] act according to a knowing and free choice” (17). Charles Curran nicely explains that, in the context of religious liberty, this means that authentic freedom necessitates that one is immune from “external coercion” that forces “one to act in a way opposed to one’s conscience or preventing one from acting in accord with one’s conscience.” Looking ahead, the concept of freedom will also play an important role in John Paul II’s theological anthropology and in his analysis of the signs of the times at the end of the twentieth century.

2.6.2 The Social Order

Whereas Leo XIII’s and Pius XI’s understandings of a divinely ordered hierarchical society constricted their theological anthropologies, the Council’s theological anthropology, which emphasized human equality and freedom, led to a less hierarchical view of society. Instead of stressing the need for persons to be satisfied with their positions in the social hierarchy as Rerum Novarum and Quadragesimo Anno did (RN

20; QA 137), *Gaudium et Spes* stated that “every social group must take account of the needs and legitimate aspirations of other groups” (26). The Council went on to argue that human dignity requires:

[T]here must be made available to all men everything necessary for leading a life truly human, such as food, clothing, shelter; the right to choose a state of life freely and to found a family; the right to education, to employment, to a good reputation, to respect, to appropriate information, to activity in accord with the upright norm of one’s own conscience, to protection of privacy, and to rightful freedom in matters religious too (26).

These rights echo those John XXIII identified in *Pacem in Terris* and create a framework for well-being that challenges inequality, including inequality of income and wealth. That is, the human rights identified by John XXIII in *Pacem in Terris*, which are reiterated here, establish the minimal conditions for human well-being. At the same time, more needs to be said about the relative nature of “enough” in regard to material goods. That is, the quantity and quality of food, clothing, and shelter that are considered necessary are related to the quantity and quality of these goods enjoyed by others.

2.6.3 *The Role of the State*

The theological anthropology articulated in *Gaudium et Spes* also influenced the Council’s understanding of the role of the state. The Council understood a primary role of the state to be that of protecting human rights, including “the rights of free assembly, of common action, of expressing personal opinions, and of professing a religion both privately and publicly” (73). The Council went on to argue that “the protection of rights is a necessary condition for the active participation of citizens . . . in the life and government of the state” (73). It was the Council’s theological anthropology, which
emphasized equality and freedom of the human person that led to its concern for the participation of citizens in political life.

2.6.4 The Problem of Human Dispositions and Attitudes

*Gaudium et Spes* located both a cause of inequality and a potential solution in “the heart of man” (10). The Council noted that human beings are “pulled by manifold attractions,” and hence they suffer from “internal divisions . . . from [which] flow so many and such great discords in society” (10). The divisions the council referred to include the pull between materialism and religion (10). Divisions in human beings’ hearts contribute to inequality because they cause human beings to act in ways that deny human dignity instead of upholding it. For example, excessive valuing of material goods leads to the hoarding and/or squandering of material goods by some while “an enormous mass of people still lacks the absolute necessities of life” (63). The Council believed that a better understanding of the human person such as it elaborates in its anthropology, would lead to orienting socio-economic life around the human person, which in turn would diminish socio-economic inequalities.

2.6.5 The Problem of Improper Development Policies

The Council also pointed to improper development policies as a cause of inequality, stating:

> We are at a moment in history when the development of economic life could diminish social inequalities if that development were guided and coordinated in a reasonable human way. Yet all too often it serves only to intensify the inequalities. In some places it even results in a decline in the social status of the weak and in contempt of the poor” (63).
The Council urged that technical progress ought to be in the service of the whole human being, “viewed in terms of his material needs and the demands of his intellectual, moral, spiritual, and religious life” (64).

2.6.6 Principles for Structuring Economic and Political Life

2.6.6.1 The Principle of Participation

The causes of economic inequality identified by the Council are very general (improper attitudes and improper development policies). The solutions it pointed toward are equally general, coming mostly in the form of principles for structuring economic and political life. First, the Council advocated broad participation in development activities: “Economic development . . . must not be left to the sole judgment of a few men or groups possessing excessive economic power, or of the political community alone, or of certain especially powerful nations. It is proper, on the contrary, that at every level the largest possible number of people have an active share in directing . . . development” (65). The principle of broad participation in development decisions challenges inequality because it allows the persons in the communities being developed, whether these are nations or areas within nations, a say in determining their needs, which affirms their dignity and ought to lead to a better distribution of the fruits of development.

2.6.6.2 The Priority of Labor, a Spirituality of Work, and the Principles of Full Employment and a Living Wage

Second, the Council indicated that “human labor . . . is superior to the other elements of economic life” (67). Building upon John XXIII’s spirituality of work, the Council articulated a spirituality and nascent theology of work (which will be developed by Paul VI and John Paul II) in which work is understood not only to be the means by
which human beings provide for their material needs, but also a means by which human beings are joined to each other in service and “enabled to exercise genuine charity and be a partner in the work of bringing God’s creation to perfection” (67). The Council went on to state that “by offering his labor to God a man becomes associated with the redemptive work itself of Jesus Christ” (67).

The Council’s interpretation of work as both materially and spiritually necessary, led it to conclude that human beings have a right to work and a duty to “labor faithfully” and that society has a duty “to help its citizens find opportunities for adequate employment” (67). Further, “payment for labor must be such as to furnish man with the means to cultivate his own material, social, cultural, and spiritual life worthily” (67).

The principles of full employment and a living wage challenge inequality by stabilizing and increasing the income of those at the bottom of the income and wealth distributions. The principles of full employment and a living wage do not, however, place limits or conditions on the distribution of profit once the conditions of full employment and living wages are met. Thus, while the principles of full employment and living wages have the potential to dramatically improve conditions for those at the bottom, they do not address the problem of relative inequality once basic needs are met.

2.6.6.3 The Principles of the Universal Destination of Goods and the Right Use of Property

Third, the Council reiterated that private property is an instrumental right, which is subordinate to the universal purpose of created goods: 137 “Whatever the forms of ownership may be . . . attention must always be paid the universal purpose for which

137 The Second Vatican Council traced this idea back to Thomas Aquinas and Rerum Novarum. See footnote 146 of Gaudium et Spes.
goods are meant. In using them, therefore, a man should regard his lawful possessions as not merely his own but also as common property in the sense that they should accrue to the benefit of not only himself but of others” (69). The Council went on to develop Leo XIII’s argument regarding the distribution of superfluous goods. While Leo XIII argued that it is a duty of charity to give out of one’s superfluous goods, the Council, drawing on the “Fathers and Doctors of the Church,” argued that “men are obliged to come to the relief of the poor, and to do so not merely out of their superfluous goods” (69). The Council went on to argue that, “if a person is in extreme necessity, he has the right to take from the riches of others what he himself needs” (69).

The principle of the common purpose of created goods and the principle of right use that follows from it, indicate that more is required of the wealthy than simply giving out of their surplus. Unlike Leo XIII’s and Pius XI’s constructions of the three-tiered framework, which advocated keeping what is necessary for one’s station in life, the Council effectively dismantles former justifications for class differences by arguing that the wealthy cannot persist in being wealthy in the face of poverty. The definitions of poverty and necessity are, however, left open. In order to effectively challenge economic inequality, poverty and need must be defined in both objective and relative terms. That is, while acknowledging the fact that we can identify basic needs – such as food, clothing, shelter – the concepts “rich” and “poor” are relative. That is how much and what kind of

138 Superfluous goods, as discussed in Section 1.2 of this Chapter, are considered in the context of the three-tiered framework which distinguishes between what is necessary for to provide for one’s own household, what is necessary to maintain one’s station in life, and superfluous goods.

139 The Council sites Basil, Augustine, Gregory the Great, Bonaventure, and Albert the Great. See Gaudium et Spes, note 147.
food, clothing, and shelter are *necessary* is relative to what is available in terms of resources and to what others have.

The Council applied the principle of right use to governments as well as individuals: “According to their ability, let all individuals and governments undertake a genuine sharing of their goods. Let them use these goods especially to provide individuals and nations with the means for helping and developing themselves” (69). This language also seems to dismantle class distinctions. There is no mention of sharing only superfluous goods. The language of paternalism has also faded. Individuals and nations are to be empowered to help themselves.

The Council went on to indicate that in “less advanced societies” the principle of right use may be “partially satisfied through the customs and traditions proper to a community” (69). The Council additionally indicated that in “highly developed nations . . . social institutions dealing with insurance and security” as well as “family and social services, especially those which provide for culture and education” can help to realize the principle of right use (69).

2.6.7 *Concluding Reflections on Gaudium et Spes*

The most important contribution of *Gaudium et Spes* to an ethic of relative economic equality and more broadly to a theology of equality is its egalitarian theological anthropology and the Council’s connection of its theological anthropology to social and economic outcomes. In affirming the fundamental equality of human beings and linking this to social and political outcomes, the Council challenged the way human beings understand each other and their relationship to one another. *Gaudium et Spes’s* development of the principle of right use is an important means by which the Council
attempted to address economic inequalities. The robust understanding of fundamental human equality articulated in *Gaudium et Spes* (and anticipated in the encyclicals of John XXIII), led the Second Vatican Council to abandon the three-tiered framework used by Leo XIII and Pius XI for governing the right use of property. While this unsettles long-held conceptions of social inequality, it does not, as I see it, necessarily address the problem of relative differences between rich and poor. That is, once the basic needs of all are met, there are not limits placed on accumulation by those at the top. Further, basic needs themselves are relative. The standard of poverty in the US, for example, is much different from the standard in developing countries. What persons need is viewed differently based on what those around them have. So while a poor person in the US may be rich by Mexican or Algerian standards, many in the US argue that measurements of poverty in the US are inadequate and there are many more people who are poor than are actually counted as being poor. It seems to me that while it is essential to establish some objective standards for basic needs – related to food, clothing, shelter, for example – these are also necessarily relative. In which case, we need some standard for determining not just basic needs but also for adjudicating the acceptable gap between those at the top and those at the bottom.

2.7 *Populorum Progressio*

*Populorum Progressio* is the fourth major encyclical to be issued in the 1960s. As Donal Dorr notes, “one might have expected Pope Paul VI to pause for a while before
writing another social encyclical. That he did not do so is an indication of the rapid changes that were taking place at this time.”

The mid-1960s were times of social, cultural, political, and economic turbulence. In 1966 alone, two African nations, Botswana and Lesotho achieved independence and two others, Ghana and Nigeria experienced military coups. The United States, South Korea, Thailand, Australia, New Zealand, and the Philippines remained at war with North Vietnam, and the Cultural Revolution was declared in mainland China. As Marvin L. Krier Mich notes, “development was the watchword of the day” and “the two superpowers, the U.S. and the U.S.S.R., were using development and military aid to line up allies in the Third World. Military interventions [such as that in Vietnam] were used to try to control the destiny of the ‘less developed’ nations.”

Theorizing about development and economic justice takes on particular importance for Paul VI because of the number of nations gaining their freedom and independence in the 1960s and the problem of political stability in these nations (PP, 6).

Paul VI, like John XXIII, was committed to sharing power and authority with the Catholic bishops of the world. He presided over the second session of Vatican II, which continued to employ the conciliar model of exercising the magisterium’s teaching authority. He went on in *Octogesima Adveniens* to advocate an inductive method for Catholic social teaching, a method which relied on and empowered the local church communities to “analyze with objectivity the situation which is proper to their own countries, to shed on it the light of the Gospel’s unalterable words and to draw principles

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140 Dorr, *Option for the Poor*, 179.

of reflection, norms of judgment and directives for action from the social teaching of the Church” (4).\(^\text{142}\)

In *Populorum Progressio*, Paul VI “offered an economic interpretation of the sources of war and argued for economic justice as the surest road to peace.”\(^\text{143}\) He was particularly concerned with addressing the topic of economic development, which emerged as a concern in *Mater et Magistra* and is further explored in *Pacem in Terris* and *Gaudium et Spes*, because he perceived “excessive economic, social, and cultural inequalities” both within and across nations as “a danger to peace” (76). *Populorum Progressio* focused especially on inequalities of growth, development, and power between nations (as contrasted with those within nations) because these problems were becoming ever more apparent as former colonies gained their independence (8-9). Like his predecessors, Paul VI was concerned with social order and the impact that conflicts between “traditional civilizations and the new elements of industrialization” were having on political communities (10). The question for Paul VI was, how do peoples and nations adapt to progress so as to reap the benefits of economic development (two of which are lessening inequalities of material possessions and political power) without losing “the moral, spiritual, and religious supports of the past” (10)? Paul VI worried that if this question was left unresolved, persons would be drawn toward violent revolutions and totalitarian ideologies (10).


2.7.1 The Problem with 1960’s Development Theory

Paul VI, unlike his predecessor John XXIII, was skeptical of the dominant theory of development of the 1960s. That is, most Western economists perceived that the solution to inequalities caused by under-development was “rapid economic growth, [which] was to be achieved by importing both Western capital and Western skills and technology.”\(^{144}\) As Barbara Ward notes:

> It seemed clear [to economists and others] that, thanks to the Keynesian revolution of ‘demand management,’ developed societies had virtually solved their problems. [The Western world] would gallop forward to the society of high consumption, there to enjoy its felicities – whatever they might prove to be. At the same time, behind us would follow the developing world by ‘stages of growth,’ and the wealth created in the process would inevitably trickle down until it reached the poorest.\(^{145}\)

Paul VI challenged the predominant economic theory that economic growth in and of itself would lift the poor out of poverty, and in so doing he also challenged inequalities. He argued that “development cannot be limited to mere economic growth. In order to be authentic it must be complete: integral, that is, it has to promote the good of every man and of the whole man” (14). Paul VI recognized that “it is not sufficient to increase overall wealth for it to be distributed equitably” (34). He argued that any and all development programs should “reduce inequalities, fight discriminations, free man from various types of servitude, and enable him to be the instrument of his spiritual growth” (34).

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\(^{145}\) Ibid.
2.7.2 Theological Anthropology

Paul VI’s arguments regarding integral development are, not surprisingly, rooted in his theological anthropology. Instead of focusing on the equality of human beings in their creation, reason, redemption, and destiny, as previous popes and the Second Vatican Council had done, Paul VI focused on the equality of personal responsibility. He wrote:

In the design of God, every man is called upon to develop and fulfill himself, for every life is a vocation. At birth, everyone is granted, in germ, a set of aptitudes and qualities for him to bring to fruition. Their coming to maturity, which will be the result of education received from the environment and personal efforts, will allow each man to direct himself toward the destiny intended for him by his Creator. Endowed with intelligence and freedom, he is responsible for his fulfillment as he is for his salvation. He is aided, or sometimes impeded, by those who educate him and those with whom he lives, but each one remains, whatever be these influences affecting him, the principal agent of his own success or failure. By the unaided effort of his own intelligence and his will, each man can grow in humanity, can enhance his personal worth, can become more a person (15).

This paragraph is remarkable for the emphasis it places on the individual as controlling his or her own outcomes, both material and spiritual. Paul VI’s emphasis on personal responsibility can be understood in part as stemming from his concern to show that “it is not possible to develop people; development is something people have to do for themselves.”146 While emphasizing the agency of all human beings as “shapers of their own destiny”147 in regards to development challenges inequality of power by indicating that wide participation in development activities ought to be normative (which ought to have the effect of equalizing the distribution of the benefits of development), an anthropology focused on individual responsibility also runs the risk of obscuring structural obstacles to persons’ abilities to shape their own outcomes. For example, in the


147 I borrow this phrase from Dorr. See Option for the Poor, 198.
US, the structure of wages, particularly the minimum wage, coupled with the failure to provide universal health care, means that a large portion of the population struggles to meet basic needs. Because that struggle can be all-consuming, it is difficult to conceptualize how persons operating in that structure are principally responsible for their own success or failure. It seems that society has failed them from the outset by not creating a structure in which basic health care is provided and wages are high enough to facilitate more than subsistence. Recognizing that Paul VI’s elaboration of the principle of the universal purpose of created things (PP 22-24) and his analysis of industrialization (PP 25-42) indicate a concern similar to the one I have outlined here regarding structural injustices, it is important to note that his theological anthropology is in tension with a more structural analysis of the problem of economic inequality.

2.7.3 Human Work

Further evidence of Paul VI’s theological anthropology is found in his discussion of human work. He noted that “by persistent work and use of his intelligence, man gradually wrests nature’s secrets from her and finds a better application for her riches. As his self-mastery increases, he develops a taste for research and discovery, an ability to take a calculated risk, boldness in enterprises, generosity in what he does, and a sense of responsibility” (25). He further argued that “while [work] can sometimes be given exaggerated significance, it is for all something willed and blessed by God” (27). Through work, Paul VI argued, human beings cooperate with God “in the perfecting of creation and communicate to the earth the spiritual imprint [they] have received” (27). Paul VI argued further that through work, human beings acquire perseverance, skill and a spirit of invention” (27). Paul VI stressed more than John XXIII the element of personal
responsibility in work, which may have the unfortunate consequence of blaming the individual when she fails to meet her basic needs through work and of minimizing the significance of the structural causes of inequality.

Importantly, however, Paul VI noted that an individual’s work does not stand alone, implying that the rewards of one’s work do not accrue simply to the individual. Work is a communal activity and when “done in common, when hope, hardship, ambition, and joy are shared, it brings together and firmly unites the wills, minds, and hearts of men; in its accomplishment, men find themselves to be brothers” (27). Here, Paul VI developed the nascent spirituality of work articulated by John XXIII. Importantly, John Paul II will build upon John XXIII’s, the Second Vatican Council’s, and Paul VI’s spirituality of work in developing a theology of work.

Further, Paul VI’s theology of work indicated that in his earlier discussion of personal initiative, he was not adopting a full-fledged liberal economic philosophy. He stated clearly that “individual initiative alone and the mere free play of competition could never assure successful development” (33). He argued that “industry is a necessity for economic growth and human progress; it is also a sign of development and contributes to it” (25). At the same time, he criticized the profit motive “as the key motive for economic progress” and “competition as the supreme law of economics, and private ownership of the means of production as an absolute right that has no limits and carries no corresponding social obligation” (26). Thus, industrialization is good, but some of the primary tenets of capitalism as we know it are bad. Like many of his predecessors and successors, Paul VI sought ways in which to modify what he considered to be the
excesses of the system so as to better distribute its benefits, which ought to have the effect of lessening inequality.

2.7.4 Solidarity

Paul VI also tempered his individualistic theological anthropology by emphasizing human solidarity. Thus, while he argued that human beings were individually responsible for their own spiritual and material outcomes, he also recognized that a spirit of cooperation was necessary to facilitate individual success. One structure he thought necessary for this was basic education (35). Further, in his discussion of solidarity, he also articulated an egalitarian social vision, which, importantly, is not economically egalitarian. Paul VI wrote:

It is not just a matter of eliminating hunger, or even of reducing poverty. The struggle against destitution, though urgent and necessary, is not enough. It is a question, rather, of building a world where every man, no matter what his race, religion, or nationality, can live a fully human life, freed from servitude imposed on him by other men or by natural forces over which he has not sufficient control; a world where freedom is not an empty word and where the poor man Lazarus can sit down at the same table with the rich man (47, emphasis mine).

While this vision is egalitarian in the sense that economic differences should not lead to social segregation, it is not economically egalitarian because it does not challenge Lazarus’s or the rich man’s economic positions. Thus it implicitly affirms differences in social and economic classes. Paul VI will further develop his egalitarian vision in Octogesima Adveniens, and while he will express concern about economic inequality in Octogesima Adveniens, his primary focus will be on politics because he came to understand that the root of most economic problems was political.¹⁴⁸

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¹⁴⁸ Door, Option for the Poor, 213.
2.7.5  Five Causes of Underdevelopment

Paul VI identified underdevelopment, in the sense of insufficient integral development, not merely economic development, as the primary cause of inequalities. He identified five reasons for underdevelopment –colonialism and neocolonialism, unfair trade practices, nationalism, racism, and unproductive monopolization of resources by a small number of people.

2.7.5.1  Colonial History

Paul VI associated insufficient development with colonial history. Hindsight reveals many inadequacies in Paul VI’s interpretation of colonialism, most especially his belief that the good brought by colonizers outweighs the bad wrought by them (7). At the same time, he challenged inequality of growth by identifying the legacy of colonialism as a cause of inequality:

The resultant situation [of colonialism] is manifestly inadequate for facing the hard reality of modern economics. Left to itself it works rather to widen the differences in the world’s levels of life, not to diminish them: rich peoples enjoy rapid growth whereas the poor develop slowly. The imbalance is on the increase: some produce a surplus of foodstuffs, others cruelly lack them and see their exports made uncertain (9).

Paul VI, echoing Pius XI, went on to point out the “scandal of glaring inequalities not merely in the enjoyment of possessions but even more in the exercise of power” (9).

2.7.5.2  Unequal Power and Unfair Trade Practices

Paul VI noted that an unequal exercise of power leads to inequalities in trading practices. Paul VI directly challenged economic inequality when he argued that imbalances in power between rich and poor nations lead to unfair trading practices, which exacerbate the already existing economic inequality between nations. He pointed to the
high profits associated with manufactured goods produced in highly industrialized nations and instability in prices and low profits associated with the raw materials produced by non-industrialized nations (57). He asserted that the rule of free trade cannot govern international relations when excessive inequalities of economic power exist (58). In essence, he extended Leo XIII’s argument regarding commutative justice between individuals to nations. That is, Leo XIII argued, in the context of his discussion of just wages, that “if the positions between contracting parties are too unequal, the consent of the parties does not suffice to guarantee the justice of their contract” (59; cf. Rerum Novarum 34). Paul VI argued:

What was true of the just wage for the individual is also true of international contracts: an economy of exchange can no longer be based solely on the law of free competition, a law which, in its turn, too often creates an economic dictatorship. Freedom of trade is fair only if it is subject to the demands of social justice (59).

Paul VI proposed general guidelines but not concrete solutions as remedies to inequalities caused by unfair trade. He wrote:

in order that international trade be human and moral, social justice requires that it restore to the participants a certain equality of opportunity. This equality is a long-term objective, but to reach it, we must begin now to create true equality in discussions and negotiations. Here again international agreements on a rather wide scale would be helpful: they would establish general norms for regulating certain prices, for guaranteeing certain types of production, for supporting certain new industries (61).

2.7.5.3 Nationalism

A third cause of underdevelopment and its concomitant inequalities, identified by Paul VI is nationalism. While acknowledging that “it is only natural that communities which have recently reached their political independence should be jealous of national unity. . . . [and] that nations endowed with an ancient culture [are] proud of the patrimony
which their history has bequeathed them,” at the same time he worried that “nationalism isolates people from their true good” (62). He was particularly concerned that nationalism has the effect of isolating peoples from one another and as such limiting economic opportunities for both rich and poor, but especially for poor nations, which would benefit from “the pooling of efforts, of knowledge, and of funds, in order to implement programs of development and to increase commercial and cultural exchange” (62). Paul’s arguments for “universal solidarity” challenge the complacency of rich nations about inequality and development across national boundaries. At the same time, his discussion of nationalism is in the form of a moral exhortation and he does not offer concrete solutions about how countries might curb nationalistic impulses or what policies might be needed to address issues such as these.

2.7.5.4 Racism

A fourth cause of underdevelopment and inequality identified by Paul VI is racism. Racism, according to Paul VI, is found in the rivalries between clans and political parties and in the legacy of relations between colonists and the indigenous population in young nations (63). Racism hinders development because it is “an obstacle to collaboration among disadvantaged nations and a cause of division and hatred in within countries wherever individuals and families see the inviolable rights of the human person held in scorn” (63). Like Paul VI’s identification of nationalism as a cause of underdevelopment and inequality, his discussion of racism is a moral condemnation. On the one hand, this presents a moral challenge to inequalities of growth and development because it calls into question understandings of the fundamental equality of human beings and the relative socio-economic equalities that ought to stem from this. On the other
hand, there is not much bite in the way of concrete proposals by which racism and its consequences can be lessened or eliminated.

2.7.5.5. Monopolization of Resources

The fifth cause of underdevelopment Paul VI identified is unproductive monopolization of resources by a small number of people. He criticized the unproductive monopolization of resources via the traditional Catholic criterion of the universal purpose of created things and the principle of the right use of goods. He invoked Genesis 1:28, “fill the earth and subdue it,” as evidence that “the whole of creation is made for man” and as such “each man has . . . the right to find in the world what is necessary for himself” (22). Quoting the Second Vatican Council, he reasoned that because “God intended the earth and all it contains for the use of every human being and people” it follows that “as all men follow justice and unite in charity, created goods should abound for them on a reasonable basis. All other rights whatsoever, including those of property and free commerce, are to be subordinated to this principle” (22). Like the Second Vatican Council, Paul VI further substantiated this teaching by appealing to the teaching of the Church Fathers. He quoted Ambrose particularly to describe the proper disposition of those with material possessions toward those in need: “You are not making a gift of your possessions to the poor person. You are handing over to him what is his. For what has been given in common for the use of all, you have arrogated to yourself. The world is given to all, and not only to the rich” (23).

149 Cf. Gaudium et Spes, 69. The Second Vatican Council cites Pius XII encyclical Sertum Laetitae and John XXIII’s consistorial allocation AAS 52 (1960): 5-11 and his encyclical Mater et Magistra as sources for this principle.
In *Populorum Progressio* Paul VI applied this teaching especially to un- or underused estates: “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 detrimental to the interests of the country, the common good sometimes demands their expropriation” (24). Here again he referred back to the teaching of the Second Vatican Council in *Gaudium et Spes*: “insufficiently cultivated estates should be distributed to those who can make these lands fruitful” (71).

By challenging distribution, Paul VI challenged economic inequality, particularly inequalities of wealth. As with many of the papal teachings, however, the focus is on meeting the basic needs of the poor. It is not clear what the basic needs of the poor are and how these are determined. As I have stressed, in order to challenge inequalities of income and wealth, poverty must be construed as relative. If poverty is understood as relative, the right use criterion might be applied to judging the moral adequacy of disparities between the ultra rich and those who are comfortable in addition to those between the moderately rich and poor.

2.7.6 *Concluding Reflections on Populorum Progressio*

The most important contributions of *Populorum Progressio* toward an ethic of relative economic equality and a theology of equality are: (1) its vision of solidarity; (2) its articulation and application of the traditional Roman Catholic principle of the universal purpose of created goods, and (3) its articulation and application of the principle of the right use of property. While Paul VI’s individualistic theological anthropology mitigates his egalitarian vision of solidarity in this document, his egalitarian leanings are important and will be further developed in *Octogesima Adveniens.*
2.8 Octogesima Adveniens

Political turbulence marked the four years between the publication of Populorum Progressio in 1967 and the issuing of Octogesima Adveniens in 1971. In the United States, Martin Luther King, Jr. and Robert Kennedy were assassinated. Israel and its Arab neighbors (Egypt, Jordan, and Syria) engaged in the Six Days War. The Vietnam War was well underway with no end in sight. These events and others may have raised Paul VI’s awareness of the potential of political power for both good and evil and encouraged his turn from economics to politics.

Ecclesiastically, Octogesima Adveniens “renewed hope in many that the fresh air of Vatican II was still blowing through the higher elevations of the Church.” The central themes of the document, “the historically constituted nature of the social teaching of the church, the role of the local community and the difficulty as well as undesirability of a single universal papal message or solution to problems,” indicated that Paul VI was developing the openness of Vatican II.

Like Mater et Magistra and the social encyclicals that followed it, Octogesima Adveniens identified inequality as a problem. Paul VI was concerned about inequalities of economic, cultural, and political development (2.2), wealth (7), and responsibility (7). Paul VI expressed concern about inequalities between areas within nations and between nations:

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150 Gudorf, “Commentary on Octogesima Adveniens,” 316.

Flagrant inequalities exist in the economic, cultural, and political development of nations: while some regions are heavily industrialized, others are still at the agricultural stage; while some countries enjoy prosperity, others are struggling against starvation; while some peoples have a high standard of culture, others are still engaged in eliminating illiteracy (2).

2.8.1 The Human Aspirations of Equality and Participation

Paul VI challenged inequality by identifying equality and participation as human aspirations, which become stronger as human beings become “better informed and better educated” (22; cf. 24). He went on to argue that equality and participation are “two forms of man’s dignity and freedom” (22). The idea that equality is an aspect of human nature and not simply a means to another end (like peace) is new. In many ways it is the logical culmination of the egalitarian impulse that began with John XXIII.

Paul VI, like John XXIII in Pacem in Terris, outlined a necessary framework of human rights in which social goals are pursued. A difference, however, is that equality, instead of being an assumed fact, guiding principle and means to another end, such as peace, is also understood as an end in and of itself. Important elements of this framework include the rights to work, to equitable remuneration for work, to old age and disability insurance and to labor union rights (14 and 18).

Paul VI went further than his predecessors in allying the pursuit of equality and freedom with democratic society. Paul VI wrote:

The two aspirations, to equality and to participation, seek to promote a democratic type of society. Various models are proposed, some are tried out, none of them gives complete satisfaction, and the search goes on between ideological and pragmatic tendencies. The Christian has the duty to take part in this search and in the organization and life of political society (24).
2.8.2  The Importance of Education for Mitigating Economic Inequality

Paul VI went on to implicitly make the case that education is critical to challenging inequality within a democratic framework (similar to PP 35). He argued that it is through education that human beings come to understand both their rights and their correlative duties (24). Paul VI shared the optimism of preceding popes that if human beings know and understand their duties, they will act in ways that will lessen inequality. Knowledge and understanding of duties can challenge inequality in that they can raise awareness of inequality as a problem and direct human action in ways that will lessen it. For example economic inequality might be lessened via knowledge and implementation of the principles of the universal destination and right use of goods. The weakness of relying on education to alleviate inequality is that alternatives that consider and propose what to do if the privileged and powerful remain unconvinced are limited. The most notable alternative is Paul VI’s suggestion, in Populorum Progressio, that property may be expropriated if it is not used to promote “the general prosperity” (24). It is not clear, however, in the turn to politics in Octogesima Adveniens, if Paul VI still considers this a viable option. He did not reiterate this alternative in Octogesima Adveniens. Instead he placed significant emphasis on “fraternal encounter” (10.2).

2.8.3  Democracy as a Means to Challenge Economic Inequality

Paul VI went on to provide an explanation for his embracing of the political theory of democracy as a challenge to inequalities (economic and otherwise) as opposed to the political theories of Marxism or liberalism. He argued that the Christian cannot embrace Marxism because of its atheistic materialism, its dialectic of violence, and “the way [in which] it absorbs individual freedom into the collectivity, at the same time
denying all transcendence to man and his personal and collective history” (26). Nor can the Christian embrace liberalism because of its exaltation of individual freedom “by withdrawing it from every limitation, by stimulating it through exclusive seeking of interest and power, and by considering social solidarities as more or less automatic consequences of individual initiatives, not as an aim and a major criterion of the value of the social organization” (26).

2.8.3.1 Critique of Socialism

Through his discussion of political systems and ideologies, we gain insight into Paul VI’s concern to balance particular aspects of the human condition, namely equality, personal liberty, the social nature of the human person, and dependence upon God, which in turn influences his willingness and conceptual ability to challenge economic inequality, especially inequalities of income and wealth. In analyzing socialism, Paul VI argued that Christians tend to idealize it in general terms, understanding it as a theory and practice which embodies “a will for justice, solidarity and equality” (31). While this general understanding of socialism is attractive to Christians and compatible with Christianity, Paul VI cautioned that Christians must distinguish between three aspects of socialism: (1) socialism as a “generous aspiration and a seeking for a more just society;” (2) socialism as an historical movement with “a political organization and aim;” and (3) socialism as “an ideology which claims to give a complete and self-sufficient picture of man” (31). Paul was concerned that these aspects of socialism are interconnected, and, as such, while the first aspect may be compatible with Christianity, the concomitant second and third aspects are not because they do not sufficiently safeguard “liberty, responsibility, and openness to the spiritual, which guarantee the integral development of
man” (31). Thus, while socialism both in theory and practice might help Christians realize the goal of relative economic equality for persons, Paul VI worried that in practice it threatens personal liberty and religion.

2.8.3.2 Critique of Marxism

Similarly, Paul VI recognized that some aspects of Marxism as a philosophy may be attractive to Christians. He distinguished between four aspects of Marxism: (1) Marxism as the active practice of class struggle; (2) Marxism as “the collective exercise of political and economic power under the direction of a single party;” (3) Marxism “as a socialist ideology based on historical materialism and the denial of everything transcendent;” (4) Marxism “as a scientific activity, as a rigorous method of examining social and political reality” (33). While acknowledging the attractiveness of Marxism as a method of analysis, he was quick to caution Christians that they cannot “accept the elements of Marxist analysis without recognizing their relationships with ideology” (33). Further, Paul VI cautioned, Christians cannot “enter into the practice of class struggle [in] its Marxist interpretation, while failing to note the kind of totalitarian and violent society to which this process leads” (33). Thus, Paul VI argued against adopting Marxist philosophy.

Dorr’s insight that Paul VI employed a consensus model of social change, in contrast with a conflict model, helps to make sense of Paul VI’s caution about class struggle. That is, Paul VI, as well as preceding popes, envisioned social, political, and economic change coming through consensus, “the willing agreement of all parties,” which is based on “rational argument, emotional appeal, and moral pressure from the various
partners in the dialogue.” Dorr contrasts the consensus model with a conflict model of social change in which “the principal means for bringing about change is pressure or threat.” The conflict model presumes “that those who have wealth or power will yield it up only reluctantly and in the face of some pressure they dare not ignore.” Thus, while class struggle might help to alleviate inequalities of income and wealth as well as other social inequalities, Paul VI and the other pontiffs did not embrace this model because it is inconsistent with their vision of harmony between members of distinct and unequal social and economic classes.

2.8.3.3 Critique of Liberalism

Paul VI also criticized liberalism, although his discussion of it is less extensive. He noted that the liberal ideology “asserts itself in both the name of economic efficiency, and for the defense of the individual against the increasingly overwhelming hold of organizations, and as a reaction against the totalitarian tendencies of political powers” (35). He cautioned that while the personal initiative valued by liberalism “must be maintained and developed,” liberalism is erroneous in its “affirmation of the autonomy of the individual in his activity, his motivation, and the exercise of his liberty” (35). Here we see echoes of the theological anthropology, which emphasized equality of personal responsibility that Paul VI articulated in Populorum Progressio. Additionally, though, Paul VI affirmed the social nature of the human person and human beings’ dependence on God. Paul VI’s criticism of radical individualism and his affirmation of the social

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152 Dorr, Option for the Poor, 196.
153 Ibid.
154 Ibid.
nature of the human person as well as the human person’s dependence on God serve to theoretically challenge economic inequality by challenging the premise of economic liberty by which inequalities are justified. That is, economic inequality is often justified by arguing that first and foremost society and political structures are obliged to protect economic liberty, and if a consequence of ensuring liberty is economic inequality, that is an acceptable cost. Paul VI attempted to hold the values of freedom and equality together, arguing that the means to alleviating economic inequality between nations is to give more freedom to developing nations to promote their own development (43.2).

Paul VI further argued:

Legislation is necessary, but . . . not sufficient for setting up true relationships of justice and equality. . . . If, beyond legal rules, there is no deeper feeling of respect for and service to others, then even equality before the law can serve as an alibi for flagrant discrimination, continued exploitation, and actual contempt (23).

Charity, then, understood as love of neighbor, Paul VI argued, is what is truly necessary in order to realize justice and equality. Paul VI also cautioned that an overemphasis on equality without concomitant cultivation of solidarity may “give rise to an individualism in which each one claims his own rights without wishing to be answerable for the common good” (23).

2.8.4 Attitudinal Causes of Economic Inequality

Paul VI also identified attitudinal causes of inequality. He pointed to problems in the attitudes of individuals and of nations. He wrote:

Today men yearn to free themselves from need and dependence. But this liberation starts with the interior freedom that men must find again with regard to their goods and their powers; they will never reach it except through a transcendent love for man, and, in consequence, through a genuine readiness to serve (45).
For Paul VI, then, the first step toward alleviating inequalities, economic and social, is a change in the hearts of human beings. This is very similar to the Second Vatican Council’s analysis in *Gaudium et Spes*, where the Council writes, “the imbalances under which the modern world labors are linked with that more basic imbalance rooted in the heart of man” (10). This analysis is sufficient up to a point in that it may encourage a change of heart and the sharing of material goods and resources, which is one of Paul VI’s proposals for alleviating inequality. And it is understandable in light of Paul VI’s consensus model of social change. At the same time, Christians working for social change according to these guidelines are stymied if the rich and powerful choose to maintain their privilege.

Paul VI also pointed to the attitudes of nations as a cause of inequality. He particularly pointed to the ambition of nations to attain “technological, economic, and military power” as impeding “setting up structures in which the rhythm of progress would be regulated with a view to greater justice, instead of accentuating inequalities and living in a climate of distrust and struggle which . . . unceasingly compromise(s) peace” (45). Here he pointed to a connection between attitudes and structures: a change in attitude about power would lead to the establishment of more equitable structures.

**2.8.5 Attitudinal and Structural Solutions to the Problem of Economic Inequality**

The solutions to inequalities of economic, cultural, and political development that Paul VI pointed to evolve out of a change in attitude, which he thought would effect structural change. First, he pointed to the need for a greater “sharing of goods, both within national communities and on the international level” (43). Second, he pointed to
development. Paul VI is cautious of the idea that economic development will bring inevitable progress. He criticized “the temptation to measure everything in terms of efficiency and of trade” and argued that human beings desire to “replace these quantitative criteria with the intensity of communication, the spread of knowledge and culture, mutual service and a combining of efforts for a common task” (41). Thus, as indicated in *Populorum Progressio*, development cannot be measured simply by growth in a nation’s gross national product. It must also be measured in terms human development.155

In his discussion of development, Paul VI indicated in general terms structural changes that may be necessary for human development. He noted that changes may be necessary in “the international division of production, the structure of exchanges, the control of profits, the monetary system” as well as changes to the “models of growth of the rich nations” (43). As a means to achieving these structural changes, Paul VI again returned to the necessity of changing people’s attitudes “so that they may realize the prior call of international duty, and to renew international organizations so that they may increase effectiveness” (43).

Another tactical move Paul VI made was to suggest that, in order to curb the strength and freedom of the economic sphere, a turn to politics as a regulatory mechanism is necessary. Certainly, previous encyclicals have called for governments to regulate aspects of the economy. Paul VI, however, indicated that a stronger turn in this direction is necessary. Dorr explains this in terms of a recognition of the failure of development theories and policies, which emphasized that poor nations would achieve

155 This analysis is similar to that of development economists like Amartya Sen who talk about the development of human capabilities. See, for example, Sen *Democracy as Freedom* (New York: Random House, 1999) and the United Nations Human Development Report, published annually since 1990.
economic success as they passed through the stages of development. Dorr argues that Paul VI recognized what many others either had or were coming to recognize: “the gap between rich and poor areas is not due simply to the fact that the latter have not yet become developed” but rather “the sad truth is that some nations or groups are poor not just because they have so far failed to climb the ladder [of success] but because they have been prevented by others from doing so.”

Dorr further argues that the turn to politics indicates that Paul VI had come to realize that at the root of most economic problems are political problems. Politics, Paul VI argued, “are a demanding manner . . . of living the Christian commitment to serving others. Without of course solving every problem, it endeavors to apply solutions to the relationships that men have with one another” (46). It is through political communities, Paul VI further argued, that “the conditions for attaining man’s true and complete good” are realized (46).

2.8.5.1 The Value and Efficacy of Participation

Whereas early documents stressed the necessity of human beings’ participation in economic decision-making, particularly in the context of the firm, *Octogesima Adveniens* stressed the necessity of participation and “a greater sharing in responsibility and decision-making” in the political sphere (47). Because of his concern for and emphasis on participation in the political sphere, Paul VI embraced democracy more ardently than his predecessors. He thought that participation in the political sphere would have the

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156 Dorr, *Option for the Poor*, 212.
157 Ibid., 213.
158 Cf. Ibid., 215.
effect of strengthening communities, which would in turn help to cultivate correct
attitudes that would lead to a lessening of economic inequality. For example, strong
communities would cultivate the correct attitude toward human freedom, which would
lead to feelings of solidarity instead of claims for radical autonomy (47).

2.8.6 Concluding Reflections on Octogesima Adveniens

Octogesima Adveniens is most often remembered for its turn away from
economics and toward politics as a means to justice.159 Equally important, however, is
Paul VI’s continuing attempt to balance the values of equality and freedom. More than
any of his predecessors, Paul VI identified equality as a fundamental aspiration,
something to be valued because it is constitutive of our nature as human beings. His
successor, John Paul II, will elevate the value of freedom, without taking much account
of Paul VI’s claim that equality is a form of human beings’ dignity and freedom (OA 22).
Additionally, the tensions between valuing the individual versus the community and the
tension between attitudinal versus structural analyses of the causes of and solutions to
economic inequality are evidenced in Octogesima Adveniens. These tensions persist in
John Paul II’s writings.

2.9 Laborem Exercens

John Paul II issued Laborem Exercens in 1981 to commemorate the ninetieth
anniversary of Rerum Novarum. Much had changed in the intervening ninety years.
John Paul II noted “new developments in technological, economic, and political
conditions” specifically:

159 Gudorf, “Commentary on Octogesima Adveniens,” 315.
The widespread introduction of automation into many spheres of production, the increase in the cost of energy and raw materials, the growing realization that the heritage of nature is limited and that it is being intolerably polluted, and the emergence on the political scene of peoples who, after centuries of subjection, are demanding their rightful place among the nations and in international decision-making (1.4).\footnote{Because John Paul II’s paragraphs are particularly lengthy, I note them using a paragraph and subparagraph numbering system. For example, “1.4” a citation from the fourth paragraph of “paragraph” one (as numbered in all official publications).}

Also in the background of *Laborem Exercens* is John Paul II’s reaction to the Solidarity trade union movement in Poland. Solidarity emerged during the Gdansk shipyard strike in August 1980. The government in Poland, with the support of the Soviet government, tried to suppress Solidarity. John Paul II “intervened in an unprecedented letter to [Soviet leader] Leonid Brezhnev in which he stated his defense of Polish sovereignty and non-negotiable support for Solidarity.”\footnote{Patricia A. Lamoureux, “Commentary on Laborem Exercens,” *Modern Catholic Social Teaching*, ed. Kenneth R. Himes, OFM (Washington D.C.: Georgetown University Press, 2005), 391.}

Ecclesiastically, *Laborem Exercens* represented the beginning of a return to the centralization of papal authority. John Paul II’s vision was universal and he thought that the Church’s teaching was universal and less contingent on historical particularity and local context than Paul VI did. Thus, the authority for crafting Catholic social teaching during John Paul II’s tenure was re-concentrated back into the office of the papacy. This shift from a more egalitarian ecclesiology to centralization of authority is important in that it represents a shift away from an overall commitment on the part of the Church to the value of equality.

Because *Laborem Exercens* is a commemorative encyclical, we expect John Paul II to revisit the social, political, and economic issues that troubled Leo XIII, showing how these issues have changed, been solved, or remain the same. Leo XIII was concerned
with addressing the concrete plight of the working class. He worried that “some remedy
must be found, and quickly found, for the misery and wretchedness which press so
heavily at this moment on the large majority of the very poor” (RN, 2). John Paul II was
also concerned with work and labor, but in *Laborem Exercens* he takes a more
philosophical approach to addressing these issues. That is, *Laborem Exercens* is a
different kind of encyclical in the sense that it is a philosophical and theological
meditation that developed a theoretical foundation for addressing “the social question.”
John Paul II argued that “work as a human issue is at the very center of the ‘social
question’” (2.1), and the bulk of *Laborem Exercens* is devoted to developing a
philosophical theology of work. In constructing his sophisticated theology of work, John
Paul II built on the nascent spirituality of work articulated by John XXIII and Paul VI.

2.9.1 A Theology of Work

John Paul II’s analysis of social problems via the lens of a theology of work
focused attention on work as a means to the development of the self. While certain
material goods facilitate self-actualization, relative positions in the socio-economic
hierarchy are not important in John Paul II’s analysis so long as the basic needs of all are
met. Thus, in *Laborem Exercens* economic equality recedes from the place of
prominence it held as both a concern and goal in the thought of John XXIII, the Second
Vatican Council, and Paul VI.

The first step John Paul II took in developing his theology of work was to
articulate a theological anthropology in which work is a constitutive element of human
identity. Instead of focusing on the essential equality of human beings in creation,
redemption, and destiny as *Gaudium et Spes* did or identifying equality and participation
as fundamental aspects of human nature (and freedom) as Paul VI did in *Octogesima Adveniens*, John Paul identified work as “a fundamental dimension of man’s existence on earth” (4.1).\(^\text{162}\) John Paul II argued that work “is one of the characteristics that distinguishes man from the rest of creatures” (0). Work, John Paul II argued, corresponds to, expresses, and increases human beings’ dignity (9.3). In making human beings’ vocation to work a cornerstone of his theological anthropology, John Paul II shifted the understanding of the substance of equality, or the goods to be equalized, away from material outcomes, which came to the forefront in the Vatican II era, to opportunities for work.

Even though John Paul II steered away from the more materially egalitarian elements of John XXIII’s and Paul VI’s theological anthropologies, he built upon their spiritualities of work. That is, John XXIII thought that work was sacred because human beings were in a way continuing the labor of Christ (MM 259), and Paul VI thought that through work human beings cooperated with God in perfecting creation (PP 27). John Paul II elaborated on both of these ideas. John Paul II drew on Genesis, calling it the first ‘gospel of work’ (25.2), as evidence supporting the idea that human beings share in the work of God via their own work (25). John Paul II found further evidence that work is sacred in the life of Christ. John Paul II argued that Christ proclaimed a gospel of work, not so much via his words, but via his deeds (26.2). John Paul went on to argue that Christians find in human work “a small part of the cross of Christ . . . [and] a glimmer of new life” (27.5). That is, we participate in the resurrection via our work.

\(^\text{162}\) Although elsewhere, John Paul II focuses on creation and redemption as fundamental components of theological anthropology.
John Paul II distinguished between objective and subjective dimensions of work. Objectively, he defined work as a “process whereby man and the human race subdue the earth” (6.3). Thus, objectively, work is what we do – planting and harvesting crops, working on an assembly line, research, writing, and teaching, et cetera. Subjectively, he defined work as a “process [through which] man manifests himself and confirms himself as the one who ‘dominates’” (6.3). In the subjective sense, then, work is a means to self-development, and because of this, John Paul II argued that labor always has a priority over capital in the production process (12.1).

John Paul II went on to argue that the value of work is to be found primarily in its subjective dimension: “the basis for determining the value of human work is not primarily the kind of work being done, but the fact that the one who is doing it is a person” (6.5). While this analysis seems to have the potential to lead to or even necessitate equal compensation for work, John Paul II quickly squelched any such materially egalitarian implications of his analysis by noting that “this does not mean that from the objective point of view human work cannot and must not be rated and qualified in any way” (6.6). John Paul II’s spiritualization of work also did little to support relatively equal outcomes in terms of income and wealth. The real value of work, John Paul II argued, is not tied to compensation, but rather value is found in self-development (26.8). While it is true that one may get a sense of satisfaction from a job well done and from the sense that one is growing in their work and contributing to the greater good via their work, this is not enough because dramatically unequal monetary rewards for work undermine other important values such as equality, solidarity, and participation.
2.9.2 The Right to Work and the Duty to Work; The Norms of Full Employment at a Living Wage

The concrete ethical norms that John Paul II drew from his theology of work are full employment and a living wage. Because work is a fundamental component of human identity, human beings have a right and a duty to work: “Man must work both because the Creator has commanded it and because of his own humanity, which requires work in order to be maintained and developed” (16.2). Further, those who work have a right, John Paul II argued, to just remuneration, which he defined as enough “for establishing and properly maintaining a family and for providing security for its future” (16.3). While a right to work and just compensation for work address the problem of poverty, these norms only indirectly address income and wealth inequality. That is, while work and just remuneration for it may establish an economic floor, the norms of full employment and living wages do little to challenge distribution of profits once minimum conditions are met. To be clear, redistribution so that minimum needs are met may have the effect of lessening inequality – simple math would suggest this is the case if the economic pie is re-cut – but the problem of what to do with surplus wealth once minimum conditions are met remains.

2.9.3 The Principles of the Universal Destination of Goods and the Right Use of Property

Another important aspect of John Paul II’s theology of work is his analysis of property and its connection with work. Like his predecessors, John Paul II drew on two traditional Catholic principles in his analysis of property: (1) the principle of the universal destination of goods; and (2) the principle of the right use of property. John Paul II invoked the traditional criterion of the universal destination of goods, arguing that
the right to private property is subordinate to “the right to common use, to the fact that goods are meant for everyone” (14.2). John Paul II invoked the principle of the universal destination of common goods to ground his argument against social conflict in labor/capital relations. That is, labor and capital cannot be opposed because “it is contrary to [their] very nature” (14.3). John Paul II was concerned with making the point that wealth creation is the product of both capital and labor and thus they must work together to see that both share it. He argued that neither “rigid capitalism” that “defends the exclusive right to private ownership” (14.4) nor social ownership (14.6) met the objective of the sharing of goods by everyone. John Paul II’s solution to the problem of incorrect ideas about who should own and control property included: (1) “associating labor with the ownership of capital, as far as possible” and (2) “producing a wider range of intermediate bodies with economic, social, and cultural purposes” (14.7). John Paul II’s suggestion to “associate labor with the ownership of capital, as much as possible” could indicate that he valued the relative equalization of the ownership of the means of production. This could in turn have the effect of equalizing income and wealth.

At the same time, however, John Paul II noted that the right use criterion led some of his predecessors to propose “joint ownership of the means of work, sharing by the workers in the management and/or profits of businesses, [and] so-called shareholding by labor” (14.5). While acknowledging that “one cannot exclude the socialization, in suitable conditions, of certain means of production” (14.3, emphasis mine), John Paul II hedged, arguing that these proposals may or may not be able to be applied concretely (14.5). He did so, I think, because of his experience living and working in Stalinist Poland, where the State owned the means of production and this did not lead to a form of
socialism that valued the worker and his or her labor. Because collective ownership can have negative forms, John Paul did not see it as necessarily insuring that labor is valued and adequately compensated.

John Paul II’s experience in Stalinist Poland led him to think that the subjective dimension of work with its personalist values (15.2) is best attended to in systems of private ownership. He argued that property should be “acquired first of all through work in order that it may serve work” (14.3). Recognizing that John Paul II was developing a philosophical theology of work in this document, it nonetheless seems ironic that in an encyclical with work as its primary focus, he offered no critique of a capitalist system in which the very wealthy “earn” most of their wealth via investments, not work.

2.9.4 Concluding Reflections on Laborem Exercens

John Paul II may not have paid much attention to relative equality of income and wealth in *Laborem Exercens* because material goods were not important to him personally. He had known material deprivation in Poland and found restrictions on economic, cultural, political, and religious freedom to be much more troubling. In his biography of John Paul II, George Weigel recounts several instances of Karol Wojtyla eschewing material comfort and of his resistance to cultural and political repression.\(^\text{163}\) His own experiences led him to emphasize freedom of expression – religious, cultural, political, and economic – more than economic equality.

2.9.5 Looking Ahead to Sollicitudo Rei Socialis

John Paul II went on in *Sollicitudo Rei Socialis* to adopt and build upon Paul VI’s distinction between having and being (28.4-7). Materially, John Paul II thought it

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was important to have what is necessary for being, for realizing one’s human vocation. He pointed in the direction of relative economic equality when he said, “there are some people – the few who possess too much – who do not really succeed in ‘being’ because . . . they are hindered by the cult of ‘having’; and there are others – the many who have little or nothing – who do not succeed in realizing their basic human vocation because they are deprived of essential goods” (SRS 28.6). On the one hand, this indirectly supports relative equality of income and wealth – too much and too little income and wealth both have negative moral consequences. On the other hand, the theme of relative economic equality, understood in terms of income and wealth, is submerged because John Paul II was concerned primarily with freedom as the “good” in need of equalization.

2.10 Sollicitudo Rei Socialis

John Paul II issued Sollicitudo Rei Socialis in 1987 to commemorate the twentieth anniversary of Populorum Progressio. Two divisions within the world community worried John Paul II – the political division between the USSR and the US and their respective allies and the widening economic gap between rich and poor countries, and rich and poor within nations. The widening economic gap was particularly troubling because “after two decades of concentrated attention given to the issue of development by the United Nations, the situation in most cases had worsened.” John Paul II saw a connection between the two divisions in that the US and the USSR were consumed by

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165 Ibid., 417.
their conflict, creating a situation in which poorer nations “were viewed either as peripheral to geopolitics or merely as pawns in a game of superpower chess.”

The ecclesiastical context of *Sollicitudo Rei Socialis* is one in which there is further evidence of re-centralization of authority and power in the Vatican. In 1984 and again in 1986, the Congregation for the Doctrine of the Faith had issued instructions on liberation theology, the grassroots theological movement in Latin America. While the first instruction was more critical than the second, both were indications of John Paul II’s desire to centralize authority, including teaching authority, in the Vatican. For example, the first instruction on liberation theology, the Congregation for the Doctrine of the Faith stated:

> In itself, the expression, ‘theology of liberation’ is a thoroughly valid term: it designates a theological reflection centered on the biblical theme of liberation and freedom, and on the urgency of its practical realization. The meeting then of the aspiration for liberation and the theologies of liberation is not one of mere chance. The significance of the encounter between the two can be understood only in light of the specific message of Revelation, *authentically interpreted by the Magisterium of the Church*.

The implication is that the Latin American liberation theologians are not authentic interpreters of Catholic theology. The tone of the second instruction was gentler, but still stressed the need for the Magisterium to correct flawed understandings of liberation, for example Latin American liberation theologians emphasis on structural sin.

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166 Ibid.


168 Congregation for the Doctrine of the Faith, “Instruction on Christian Freedom and Liberation,” (1986), 37. Here, the Congregation noted: “Man’s sin, that is to say his breaking away from God, is the radical reason for the tragedies which mark the history of freedom. *In order to understand this, many of our contemporaries must first rediscover a sense of sin.*” The emphasis is mine. I interpret this as the Congregation implying that the Latin American liberation theologians do not have a correct doctrine of sin.
Because *Sollicitudo* commemorated *Populorum Progressio*, we expect the encyclical to deal with the question of development, and, in fact John Paul II noted that part of the originality of *Populorum Progressio* is its treatment of this topic (10.1). John Paul II also understood the originality of *Populorum Progressio* to consist in its moral evaluation of development, especially its analysis of the importance of individual decisions and actions and the relationship between individual conduct “and the poverty and underdevelopment of so many millions of people” (9.8).

In reading the signs of the times, John Paul II identified the problems of poverty and inequality:

> Without going into an analysis of figures and statistics, it is sufficient to face squarely the reality of an innumerable multitude of people – children, adults, the elderly – in other words, real and unique human persons who are suffering under the intolerable burden of poverty (13.2).

He also noted the “persistence and often the widening of the *gap* between the areas of the so-called developed North and the developing South” (14.1, emphasis mine). He was not worried about the gap in income and wealth per se as much as he was worried about the gap in particular goods, services, opportunities, and capabilities (in Amartya Sen’s definition of the term). 169 That is, like Sen, John Paul II implied that access to the goods we have reason to value can be dissociated from income and wealth, making inequalities of income and wealth less important than they might otherwise be. John Paul II cited specifically the gap in “the production and distribution of foodstuffs, hygiene, health and housing, availability of drinking water, working conditions (especially for women), [and] life expectancy” (14.3). Equally importantly, he noted that “the frontiers of wealth and

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169 Sen defines a person’s capability as “a kind of freedom: the substantive freedom to achieve . . . various lifestyles.” See *Development as Freedom*, 75.
poverty intersect within the societies themselves, whether developed or developing” (14.1).

2.10.1 Attitudinal and Structural Causes of Economic Inequality

John Paul II understood individual and collective attitudes as well as structural problems to be causes of inequality. In analyzing the disparities in development between nations, he pointed to “differences of culture and values systems” as a reason for economic inequality (14.5). John Paul II (like Paul VI) also pointed to discrimination, especially racial discrimination, which can become embedded in structures, as an attitude that causes inequality (15.1).

He also identified structural causes of inequality such as the lack of skills, particularly literacy, and the suppression of certain rights, particularly the rights of political participation and economic initiative as causing underdevelopment and inequality (15.1-15.2). He was especially concerned about restrictions on economic initiative. He wrote:

Experience shows us that the denial of this right, or its limitation in the name of an alleged ‘equality’ of everyone in society, diminishes, or in practice absolutely destroys the spirit of initiative, that is to say the creative subjectivity of the citizen. As a consequence, there arises not so much a true equality as a ‘leveling down.’ In the place of creative initiative there appears passivity, dependence and submission to the bureaucratic apparatus which, as the only ‘ordering’ and ‘decision-making’ body – if not also the ‘owner’ – of the entire totality of goods and the means of production, puts everyone in a position of almost absolute dependence, which is similar to the traditional dependence of the worker-proletarian in capitalism. This provokes a sense of frustration or desperation and predisposes people to opt out of national life” (15.2).

John Paul II’s discussion of economic initiative gives insight into his understanding of the substance of equality. That is, one good John Paul II wanted to equalize is
opportunity. More specifically, John Paul II wanted to equalize opportunity to exercise initiative in the spheres of economics, culture, religion, and politics. He noted that “the sad reality of today” may be attributed, at least in part, to a “too narrow idea of development, that is, a mainly economic one” (15.6). Instead of focusing on widening gaps in the distribution of income and wealth, John Paul II called our attention to other “privations or deprivations” that, in his words, are also forms of poverty: the limitation of the rights to religious freedom, to social, political, and economic participation, to organization and formation of unions, and to economic initiative (15.5). Relative equality of income and wealth was not his priority because he did not think relative equality of income and wealth were essential to being -- realizing one’s human vocation.

In his reading of the signs of the times, John Paul II pointed to three specific indications of underdevelopment in developed countries: (1) the housing crisis, (2) un- and underemployment, and (3) international debt (17-19). As contributing factors to these problems, John Paul II pointed to urbanization and “a whole series of shortcomings” “simply human in nature” (17.3-17.4).

Another structural cause of inequality John Paul II identified was the East-West divide. He indicated that the political tensions between East (USSR and its allies) and West (US and its allies) led to “growing military opposition” between the two blocs (20.6), which in turn led to “wars by proxy” whereby the more powerful nations of the East and West manipulated local conflicts (20.7) in the developing South. The effect of the manipulation of southern nations by countries in the East and West is a misdirection of the economic resources of the southern nations towards arms production and trade and
away from socially necessary goods, which has, in turn, resulted in the “retardation or stagnation” of development (22.1).

While John Paul’s analysis of the East-West divide identified a structural problem, it is the attitudes of the eastern and western nations of which John Paul II was most critical. He noted that “the West gives the impression of abandoning itself to forms of growing and selfish isolation” while the East “seems to ignore for questionable reasons its duty to cooperate in the task of alleviating human misery” (23.5). He further identified positive attitudes, which he believed were the solutions to poverty and underdevelopment: a more lively concern for human rights, a recognition of human beings’ common destiny, ecological concerns (pertaining to the realization of limits of natural resources), and the generous commitment of “statesmen, politicians, trade unionists, people of science, and international officials . . . who . . . try to resolve the world’s ills and . . . ensure that an ever increasing number of people may enjoy the benefits of peace and a quality of life worthy of the name” (26.1-26.8).

In his discussion of authentic development, John Paul II continued to identify problematic attitudes as the cause of inauthentic development. He noted that “the mere accumulation of goods and services, even for the benefit of the majority, is not enough for the realization of human happiness” (28.1). In fact, according to John Paul II, the accumulation of goods and services can become oppressive, because “the more one possesses the more one wants, while deeper aspirations [may] remain unsatisfied and perhaps even stifled” (28.3).

John Paul II also worried about those who have too little because a lack of goods and services may inhibit the realization of basic human vocations (28.6). Interestingly, in
his analysis, John Paul II noted that the problem does not lie in the possession of goods, but in “possessing without regard for quality and the ordered hierarchy of the goods one has” (28.7). Thus, it is human attitudes toward goods, not the fact of inequalities in the means of accumulation of them that is problematic.

2.10.2 The Principles of the Universal Destination of Goods and the Right Use of Property

This brings us to John Paul II’s analysis of private property and his employment of the traditional Roman Catholic criteria of the universal destination of goods and of the right use of goods. John Paul II, like his predecessors, affirmed the right to private property (42.5). He also, like his most recent predecessors, indicated that private property is under a “social mortgage,” meaning that the right to private property is subsumed under the principle of the universal destination of goods (42.5). As such, the Church as well as ministers and members of the Church, are obliged to give not only out of their “abundance” but also out of their “necessities” (31.7). While the right use criterion has the potential to challenge inequalities of wealth and income, it does not challenge economic power or the structures which allow accumulation, even vast accumulations, by some and minimal accumulation by others. The right use criterion basically indicates that a certain amount of sharing is morally necessary while hording is morally suspect. It appeals to our sense of right and wrong about distribution after the fact of accumulation, but it does little to criticize the means by which some prosper and others do not.
2.10.3 Attitudinal Causes of and Solutions to Economic Inequality

John Paul II explained the vast accumulation by some at the expense of others in terms of attitudes. He stated that it is necessary to “single out the moral causes which, with respect to the behavior of individuals considered as responsible persons, interfere in such a way as to slow down the course of development and hinder its full achievement” (35.2). The attitudes which are problematic and lead to imbalances in development are “the all-consuming desire for profit” and the “thirst for power” (37.1). John Paul II understood these attitudes to be “indissolubly united” in today’s world and he attributed these attitudes to both individuals and nations (37.2-37.3). He went on to note that the problem of modern imperialism is attitudinal, caused by the idolatry of money, ideology, class, and technology (37.3).

For John Paul II, the solutions to underdevelopment, poverty, and inequality (of freedom, participation, and opportunity for economic initiative) were also attitudinal. The main attitude or virtue to be cultivated in order to combat underdevelopment, poverty, and inequality, is solidarity. John Paul II defined the virtue of solidarity as “a firm and persevering determination to commit oneself to the common good; that is to say the good of all and of each individual because we are all really responsible for all” (38.6). Solidarity would lead to the right sharing of material and social goods: “Those who are more influential, because they have a greater share of goods and common services, should feel responsible for the weaker and be ready to share with them all that they possess” (39.1). While John Paul II previously identified the East-West proxy wars as a cause of poverty and inequality between North and South, here he reaffirmed that the primary remedy is a change in attitude:
“[S]tructures of sin” are only conquered – presupposing the help of divine grace – by a diametrically opposed attitude: a commitment to the good of one’s neighbor with the readiness, in the gospel sense, to “lose oneself” for the sake of the other instead of exploiting him, and to ‘serve him’ instead of oppressing him for one’s own advantage (38.6).

Curran, Himes, and Shannon applaud John Paul II’s attention to attitudinal change as a welcome corrective to Catholic social teaching:

Although Catholic moral theology gives a central role to the virtues, the focus on structures and institutions in Catholic social teaching has often led to the neglect of virtue theory in the literature . . . . It is refreshing, therefore, to find John Paul giving such a central role to the virtue of solidarity.  

On the one hand I agree that attitudes and traits of character function to motivate and sustain social change. On the other, I worry that an emphasis on attitudinal change is insufficient because there are no “teeth” in such a proposal. It takes time to change attitudes, and in Christian language, hearts can be hardened and very resistant to change. It seems that more coercive measures – like a tax policy aimed a redistribution – may be necessary.

John Paul II’s explication of solidarity included an appeal to the “equality of all peoples” (39.4) and an appeal for human beings, particularly the socially, politically, and economically privileged, to see “the ‘other’ – whether a person, people, or nation . . . as our ‘neighbor,’ a ‘helper,’ to be made a sharer on a par with ourselves, in the banquet of life to which all are equally invited by God” (39.5). He used the foundation of human equality (39.4) to proscribe “exploitation, oppression, and annihilation of others,” but John Paul II did not indicate in what ways he thought human beings were equal. His only

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explication of fundamental human equality in *Laborem Exercens* and *Sollicitudo Rei Socialis* is in terms of human beings as equal in our vocation to work.

2.10.4 *Attitudinal and Structural Solutions to Structural Causes of Economic Inequality*

John Paul II went on to argue that fundamental human equality and solidarity motivate in human beings a concern for the poor (43.1) and this concern leads to further concerns about international trade, the world monetary and financial system, technological exchanges and their proper use, and the need to review the structure of existing international organizations (43.2). He was critical of the division of labor in international trade whereby “the low-cost products of certain countries which lack effective labor laws or which are too weak to apply them are sold in other parts of the world at considerable profit” (43.3). His solution to this problem was for nations of the same geographic area to band together and coordinate production and trade (45.2). While this does indicate John Paul II’s concern for relative equality between trading partners, I am not sure that this adequately accounts for imbalances of power between nations and the effects that power has on trade.

Similarly, John Paul II was critical of the effect of “excessive fluctuation of exchange rates and interest rates” on the “balance of payments and the debt situation of the poorer countries” (43.4). His solution to this problem was the “extension of cooperation” in the financial and monetary sectors of nations in the same geographic area. Again, it is not clear to me that, without some prior rectification of the debt problems of nations in the South, that they have the power to effect change via cooperation with other similar nations.
John Paul II was much more concrete in his prescriptions for the form of political structures that flow from a recognition of fundamental human equality. He criticized dictatorial and authoritarian forms of government and prescribed democratic and participatory political institutions (44.5.). He noted that “the free and responsible participation of all citizens in public affairs, in the rule of law and in respect for the promotion of human rights is the necessary condition and sure guarantee of the development of the whole individual and of all people” (44.5). Missing, it seems, is an acknowledgement that material conditions – both those of deprivation and inequality – restrain participation.

2.10.5 Concluding Reflections on Sollicitudo Rei Socialis

In conclusion, in Sollicitudo Rei Socialis John Paul II expressed concern for inequality, including inequality of material goods such as food, water, and housing. He was even more concerned, however, with freedom, because he believed that if peoples and individual people had political freedom and freedom for economic initiative, vast inequalities would be eliminated. In this sense, John Paul II concurred with Amartya Sen – development is freedom.\textsuperscript{171} I am concerned, however, that political freedom and opportunity for economic initiative are insufficient means for expressing fundamental human equality and for realizing equality of dignity. That is, even in societies like the US, that have the kinds of political freedom and freedom for economic initiative envisioned by John Paul II, significant inequalities of income and wealth exist and matter in terms individual’s and groups of individuals’ quality of life and expression of their human dignity.

\textsuperscript{171} This is the title of Sen’s book published in 1999.
2.11 *Centesimus Annus*

Like *Laborem Exercens*, *Centesimus Annus* commemorates *Rerum Novarum*. As such, we expect John Paul II to revisit themes such as poverty, work, and private ownership from the earlier document. In the ten years since John Paul II issued *Laborem Exercens* commemorating the ninetieth anniversary of *Rerum Novarum*, disparities between rich and poor increased. In the United States, for example, the average income of the lowest quintile in 1979 was $14,100, while the average income of the top one percent of families was $466,800.\(^{172}\) By 1989, the average income of the lowest quintile had fallen to $13,500, while the average income of the top one percent had risen to $731,900.\(^{173}\) Thus the income gap between rich and poor rose from 33:1 to 54:1. Between 1984 and 1985 more than one million people died during the famine in Ethiopia. More positively, the Soviet Union withdrew troops from Afghanistan after nearly ten years of war and one million Afghan casualties and a cease-fire was agreed to by Iran and Iraq, ending eight years of war between those two countries.

The most significant event influencing John Paul II, however, was the fall of the Berlin Wall in November 1989. For John Paul II and the rest of the world this symbolized the end of the Cold War and the end of the entrenchment of ideological opposition between East and West. The symbolic importance of the fall of the Berlin Wall and actual importance of an opening of dialogue between East and West decisively shaped John Paul II’s reading of the signs of the times. Influenced by his experience of oppression in Stalinist Poland, John Paul II identified misunderstandings of human

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\(^{173}\) Ibid.
freedom, especially restrictions on political and economic freedom and their socioeconomic consequences, as the primary social problem of the late twentieth century.

Ecclesiastically, it is important to note that while John Paul II continued to centralize authority, including teaching authority, in the office of the papacy and the Vatican, he was humble about the limitations of “the Church’s insights into what are not simply moral but technical matters.” Thus, unlike Leo XIII or Pius XI, who proposed radical changes in social organization to ameliorate economic ills, John Paul II talked instead about “both the values to be incorporated and the role of the state in setting up the structures of economic and political life.”

2.11.1 The Priority of Freedom

In *Centesimus Annus*, John Paul II remained attentive to economic inequality, but for him this problem is secondary. That is, John Paul II was still concerned about the gap between rich and poor, especially the disparities that existed between rich and poor nations (21.1), but he attributed the cause of economic inequality (and other social ills) to the suppression of freedom and concomitantly he understood the solution to economic inequality to be the expansion of freedom.

To be clear, John Paul II valued freedom – religious, political, cultural, and economic – so much so that this was the primary “good” he thought needed equalizing. He valued freedom as an inherent aspect of human nature and dignity and also as a means for achieving the common good. His understanding of freedom, however, was not

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175 Leo XIII proposed a return to the medieval guild system; Pius XI endorsed corporatism.

176 Finn, “Commentary on *Centesimus Annus,*” 439.
freedom as license but rather freedom to do what one ought (CA 4.5). John Paul II’s understanding of freedom is illustrated in his analysis of ecological problems. He argued:

At the root of the senseless destruction of the natural environment lies an anthropological error. . . . Man, who discovers his capacity to transform and in a certain sense create the world through his own work, forgets that this is always based on God’s prior and original gift of the things that are. Man thinks that he can make arbitrary use of the earth, subjecting it without restraint to his will, as though it did not have its own requisites and a prior God-given purpose, which man can indeed develop but not betray. Instead of carrying out his role as a cooperator with God in the work of creation, man sets himself up in place of God and thus ends up provoking a rebellion on the part of nature, which is more tyrannized than governed by him (CA 37.1).

This is an example of human beings abusing their freedom. Rather than doing what they ought, human beings have done what they will and the consequence is environmental destruction.

John Paul II’s emphasis on freedom was rooted in his theological anthropology, his understanding of the nature and dignity of the human person. In revisiting Rerum Novarum, he noted:

The guiding principle of Pope Leo XIII’s encyclical, and of all the church’s social doctrine, is a correct view of the human person and of his unique value, in as much as ‘man . . . is the only creature on earth which God created for itself.’ God has imprinted his own image and likeness on man (cf. Gen. 1:26), conferring upon him an incomparable dignity (11.3).

One aspect of the correct view of the human person, according to John Paul II, is that “human nature is made for freedom” (25.2). It cannot be emphasized enough that for John Paul II freedom is not freedom to do whatever one wants but rather freedom to do what one ought to do, and freedom to do what one ought is bound up with truth. In John Paul’s words, the first condition of freedom is “obedience to the truth about God and man” (41.4).
In the economic sphere, freedom for John Paul II took the form of freedom for economic initiative. Freedom for economic initiative is necessary first and foremost because work is human beings’ response to God’s gift of the earth and the goods of the earth (31.2). Freedom for economic initiative is especially important in a modern economy, John Paul thought, because in the modern environment “man’s principal resource is man himself” (32.2) as contrasted with land as the primary economic resource in a pre-modern economy.

2.11.2 Human Rights: The Framework in which Social Goals are Pursued

A second aspect or consequence of human dignity according to John Paul II is that “something . . . is due to man [simply] because he is man, by reason of his lofty dignity” (34.1). Stated differently, because of the dignity of the human person, “there exist rights which do not correspond to any work [man] performs, but which flow from his essential dignity as a person” (11.3; cf. 34.1).

The rights John Paul II referred to are the same as those articulated by John XXIII in *Pacem in Terris*. They constitute the framework in which social goals are pursued. The rights John Paul II referenced include “a sufficient wage for support of the family, social insurance for old age and unemployment, and adequate protection for the conditions of employment” (34.2). John Paul II went on to note that the possibility of making “an active contribution to the common good of humanity” is inseparable from these rights (34.1). He understood contributions to the good of humanity to be made primarily via a human being’s work and in order to do the work they are intended to do, human beings must be free. That is, John Paul II thought that human beings must be free – that is have religious, cultural, political, and economic freedom – so that they could
respond to their personal vocations, “and thus to God’s call” (29.1). “The apex of development,” according to John Paul, “is the exercise of the right and duty to seek God, to know him and to live in accordance with that knowledge” (29.1). Thus, John Paul II’s argument is somewhat circular: human beings have certain rights by nature of their dignity, i.e., they have nothing to do with the work human beings perform, yet the rights he named are all connected to work, with the exceptions of old age and unemployment insurance (even these are related to work in the sense that they are designed to protect those who cannot work).

2.11.2.1 The Right to Private Property and the Principles of the Universal Destination of Goods and the Right Use of Property

John Paul II supported the right to private property because he understood private property as “fundamental for the autonomy and development of the person” (30.1). The foundation of the right to private property, for John Paul, was work for the sake of providing for one’s needs as well as for one’s family, community, nation, and all of humanity. “Ownership of the means of production,” he argued, “is just and legitimate” to the extent that such ownership “serves useful work;” such ownership is illegitimate “when it is not utilized or when it serves to impede the work of others, in an effort to gain a profit which is not the result of the overall expansion of work and the wealth of society, but rather is the result of curbing them or of illicit exploitation, speculation or the breaking of solidarity among working people” (43.3).

It is helpful to compare John Paul II’s understanding and justification of private property with the traditional Catholic doctrine of private property articulated by Thomas Aquinas because John Paul II is implicitly, if not explicitly, drawing on Aquinas. For
Aquinas, “there were two dimensions of the question of private property: first, the procuring and dispensing of goods and second, the use of goods.” Thomas gave three reasons that the procuring and dispensing of property was best left to individuals: (1) “people are more careful to produce or otherwise obtain something that would be theirs personally than if, following the procurement, it were to be owned by everyone in common”; (2) “human affairs will be more orderly if particular persons are charged with taking care of particular things”; (3) “with private procuring and dispensing of property there will be greater peace, as there will be no disputes as to who has authority over which things.” John Paul implicitly affirmed Thomas’s justifications for procuring private property. Quoting Gaudium et Spes, he also emphasized the connection between private property and human freedom: “Private property or some ownership of external goods affords each person the scope needed for personal and family autonomy, and should be regarded as an extension of human freedom” (CA 30.3).

While John Paul affirms the right to procure private property, he placed more emphasis on the right use of property. Regarding the use of property, Thomas argued that “everyone should possess things ‘not as their own, but as common’ so that the owner is ‘ready to commit them to others in their need.’” John Paul echoed Thomas’s understanding of the universal destination of goods and presented himself as being in continuity with Leo XIII on this point. He noted: “The ‘use’ of goods, while marked by freedom, is subordinated to their original common destination as created goods” (30.2).

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177 Ibid., 445.

178 Ibid.

179 Ibid.
As Daniel Finn importantly notes, John Paul stressed that the very nature of property, including God’s intention for it to meet human needs, dictates its right use.

Like his most immediate predecessors, John XXIII and Paul VI, John Paul II stressed that right use of property included giving out of one’s excess and need. Importantly, he also understood the principle of right use to govern investment (36.4) in order to help “entire peoples who are presently excluded or marginalized to enter into the sphere of economic and human development” (58).

While John Paul endorsed the free market as “the most efficient instrument for utilizing resources and effectively responding to needs,” (34.1), he also stressed that a strong juridical framework is necessary to govern the market in order to ensure that basic human needs are met (35.2) because “there are many human needs which find no place on the market” (34.1). The juridical framework, according to John Paul, must guarantee “individual freedom . . . private property . . . stable currency and efficient public services” (48.1). The juridical framework must also ensure “a sufficient wage for support of the family, social insurance for old age and unemployment, and adequate protection for the conditions of employment” (34.2). Importantly, for John Paul, the obligation to work (spelled out most clearly in *Laborem Exercens*) presumes the right to do so (43.4).

2.11.3 **Downplaying the Importance of Economic Inequality**

John Paul II downplayed the importance of relatively equal social outcomes. In part this is because he is concerned about placing too much importance on economic life to the exclusion of religious, ethical, and cultural life (39.4). He indicated the breadth of his concerns (and weakened his critique of economic inequality) in expanding the
Catholic conception of the preferential option for the poor to include cultural and spiritual poverty as well as economic poverty (57.2).

John Paul II was concerned about a minimum of economic well-being because he believed this was essential for integral human development, but beyond this he valued economic freedom more than relatively equal economic outcomes. While establishing a floor of economic well-being would improve life-expectancy, health, and quality of life of the poor, it does not address or critique relative differences, which impede human solidarity. Emphasis on establishing a floor of economic well-being also leaves open the possibility and likelihood of a paltry assessment of human needs. A number of neo-conservative scholarly studies, for example, argue that the poor in the United States are not really poor. Dinesh D’Souza in his book *Virtue of Prosperity* argues: “If poverty is understood in its normal sense – as the absence of food, clothing, shelter – it is no longer a significant problem in America.”

D’Souza’s cites as evidence for his claims that Americans defined by their government as poor have their basic needs met, and the “facts” that “60% have microwave ovens and VCR’s, 70% have one or more cars, 72% have washing machines, 77% have telephones, 93% have at least one color television, and 98% have a refrigerator.”

To be clear there are two issues here. First, the debate over what constitutes a sufficient economic floor and second whether an absolute floor, no matter how robust in its conception, is sufficient if it does not account for relative differences in economic well-being. It is my contention that relative differences matter in part because they

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impede solidarity and in part because of their fundamental unfairness. Catholic social teaching in general and John Paul II in particular do not take sufficient account of relative differences. This seems particularly important in light of CST and John Paul II’s emphasis on the virtue of solidarity.

2.11.4 Concluding Reflections on Centesimus Annus

In conclusion, Centesimus Annus calls into question the priority of relative equality of income and wealth. For John Paul II, the priority was equalizing freedom for political, cultural, and economic participation and initiative. John Paul II believed that if people had these freedoms and if a strong juridical framework accompanied them, then justice would be realized. Freedom and a strong juridical framework would insure a floor of material well-being, and beyond this relative equality of income and wealth was not important to John Paul II. In terms of material goods, John Paul II’s primary concern was having enough to be; that is, to develop and practice one’s vocation.

2.12 Contributions of Official Roman Catholic Social Teaching to a Theology of Equality and an Ethic of Relative Economic Equality

The prospects for a Catholic ethic of relative economic equality and a theology of equality hinge on six factors: (1) identification of inequality as a problem; (2) identification of an equalizandum (good to be equalized), or, stated differently, an answer to the question, “equality of what?” (3) theological anthropology; (4) a spirituality and theology of work; (5) the principles of the universal destination of material goods and the right use of property; and (6) the values of participation and solidarity.

From Leo XIII to present, Catholic social teaching has worried about poverty and to a certain extent economic inequality, but the goods it has worried about equalizing
have varied. Pius XI worried about equalizing economic power. John XXIII worried about equalizing income, wealth, and social advancement. The Second Vatican Council worried about equalizing wealth, resources, economic power, freedom, social status, the benefits of culture, and political participation. Paul VI worried about equalizing growth, development, and power between nations. John Paul II worried about equalizing freedom as well as access to goods such as food, hygiene, health, housing, drinking water, and life expectancy. In his final social encyclical, *Centesimus Annus*, John Paul II emphasized the priority of freedom. He believed that basic material needs would be met (and thus the distribution of goods sufficiently equalized) if persons had freedom for political, cultural, and economic participation and initiative. What is striking is that concern for equalizing income and wealth recedes after the Second Vatican Council.

An egalitarian theological anthropology began to emerge in the encyclicals of John XXIII, was further developed in the Second Vatican Council’s *Gaudium et Spes*, and reached its apex in Paul VI’s *Octogesima Adveniens*. Explicit attention to the equality of human beings waned in the encyclicals of John Paul II. The shift in focus away from equality to freedom has had the effect of minimizing the importance of relative equality of income and wealth and emphasizing the importance of participation in politics and culture.

A Catholic spirituality of work began to emerge in John XXIII’s *Mater et Magistra*, was further developed by Paul VI, and became a theology of work in John Paul II’s *Laborem Exercens*. A spirituality and theology of work can cut both ways in terms of promoting or criticizing economic inequality. On the one hand, a spirituality and theology of work can be used to minimize the importance of material rewards for work
by overly spiritualizing the value of work. On the other hand, focus on the unitive
dimensions of work can support an ethic of relatively equal material rewards for work.

The principles of the universal destination of material goods and right use of
property contribute to the emphasis in Catholic social teaching from John XXIII forward
on a juridical framework which governs economic activity. This juridical framework has
been expressed in terms of human rights, including the rights to food, clothing, shelter,
rest, medical care, basic education, freedom to practice one’s religion, freedom to choose
freely one’s state of life (single, married, priesthood), to work, to safe working
conditions, to a living wage, to private property, to assembly and association, to emigrate
and immigrate, to participation in political life. A key question is whether this juridical
framework sufficiently promotes equality. Further, what kind of equality does such a
framework promote? I am thinking particularly of equality of material goods such as
food, clothing, and shelter. The juridical framework of Catholic social teaching seems to
imply that a floor of basic well-being can be established and that this floor does not place
any limits on accumulation at the top of the income and wealth distributions so long as
the basic needs of all have been met. Clearly, some basic needs are objective (number of
calories needed to sustain life), but it is not clear to me that the juridical framework
adequately accounts for the social nature of material goods and the ways in which
significantly narrowing the gap between rich and poor would facilitate social, political,
and economic participation and social solidarity.

The value of participation in economic life emerged in Quadragesimo Anno. Pius
XI believed that expanding participation in economic decision-making would lead to a
better distribution of economic power. Paul VI also emphasized the importance of social,
political, and economic participation, arguing that participation and equality are forms of human beings’ dignity and freedom. A key question is can an equalization of social, political, and economic participation occur without an equalization of material conditions?

The value of solidarity emerged in *Populorum Progressio*, tempering Paul VI’s emphasis on the individual in that document. John Paul II emphasized solidarity as well. A key question is does solidarity promote equality by calling into question the possibility of practicing this virtue across class lines or does solidarity legitimate inequalities by stressing that what is really needed is a benevolent paternalism?

Further evaluation of the potential for these factors to contribute to a theology of equality and an ethic of relative economic equality will be taken up in chapters four and five. The next chapter examines interpretations of economic inequality by the Religious Society of Friends (Quakers).
CHAPTER THREE

QUAKER INTERPRETATIONS OF ECONOMIC INEQUALITY

3.1 Introduction

The Quaker movement arose in seventeenth century England during a time of political, religious, and social upheavals.\textsuperscript{182} As Hugh Barbour notes:

The Society of Friends formed as a culmination to and reaction against the Protestant Reformation. Martin Luther and sixteenth century Calvinism shaped Quaker beliefs in the seventeenth-century: that humans are “justified” by God’s grace, not human merit; that all believers share a mutual priesthood; and that God’s word both in the Scriptures and by the Spirit in human hearts demands primacy over human ideas and desires.

Quaker life was also shaped by European Anabaptists and English Baptists, who rejected the Reformers’ beliefs in predestination, infant baptism, and nationwide churches and who saw the essence of Christianity as obedience to demands for purity of heart, honest, simple dress, and separation from the state and war-making.\textsuperscript{183}

From its inception, the Quaker movement had egalitarian leanings. From its very beginnings the Quaker tradition evidenced social equality by “refus[ing] titles and gestures of honor to humble everyone equally.”\textsuperscript{184} The Quaker tradition also emphasized


\textsuperscript{183} Hugh Barbour and J. William Frost, \textit{The Quakers} (New York: Greenwood Press, 1988), 4-5.

\textsuperscript{184} Ibid., 43.
spiritual equality by practicing “the equality of ministry of all Friends, rich and poor, young and old, educated and unschooled, and especially women and men.”

The purpose of this chapter is to show how textual sources in the Quaker tradition have both supported and challenged economic inequality. Have the egalitarian leanings of the Quaker tradition led it to criticize the problem of economic inequality? How has the Quaker tradition defined the problem of economic inequality and how have these definitions supported or challenged inequalities? How has this religious tradition understood and analyzed the causes and effects of as well as the solutions to economic inequality, and how have these understandings and analyses supported or challenged inequality? How have fundamental theological beliefs of the Quaker tradition shaped the definitions and analyses put forth by this tradition, and how have these beliefs functioned in supporting or challenging economic inequality? How have social, political, and economic theories influenced the tradition’s descriptions and analyses of economic inequality, and how has its embracing or challenging of prevailing theories facilitated its ability to support and/or challenge economic inequality?

Unlike the Roman Catholic tradition, the Quaker tradition has no official teaching authority. As such, Friends do not have documents like the Catholic encyclicals, which are authoritative for the entire tradition. In fact, to speak of a single Quaker tradition is problematic since there is no overarching structure which governs all Quaker meetings. Yet, at the same time, there are theological beliefs and ethical testimonies that seem to guide Quakers as a whole.

Ibid.
In this project, I have relied on the books of faith and practice of Britain (at times known as London) Yearly Meeting (BYM) and Philadelphia Yearly Meeting (PYM) as my primary sources for unearthing Quaker interpretations of economic inequality. I chose the texts of Philadelphia Yearly Meeting as a source because PYM is the largest and one of the oldest yearly meetings in the United States. I chose to examine the texts of BYM because of Britain’s importance as the place where Quakerism originated and because PYM (and other yearly meetings) has historically looked to BYM for theological and practical guidance.

Philadelphia Yearly Meeting describes its *Faith and Practice* as “a guide for our members and all those who seek to understand in greater detail the ways we endeavor to apply our fundamental affirmations.”\(^{186}\) Britain Yearly Meeting (BYM) describes its *Quaker Faith and Practice* as “the Christian discipline” of its yearly meeting. BYM goes on to explain that while “[d]iscipline is not now a popular word. . . . its roots lie in ideas of learning and discipleship.”\(^{187}\) Thus, discipline in the context of BYM “consists for the most part of advice and counsel, the encouragement of self-questioning, of hearing each other in humility and love.”\(^{188}\) These texts, while much more general than the Catholic encyclicals, are the best representation of the Quaker tradition’s thought.

I have grouped the texts into four periods, the late nineteenth century, the early twentieth century, the mid twentieth century, and the late twentieth century because these


\(^{188}\) Ibid.
are the points at which significant changes in the interpretations of the testimonies of equality, peace, and simplicity occur. These are the key Quaker testimonies, “deeply held historically rooted attitudes and modes of living in the world,”\textsuperscript{189} that shape the Quaker tradition’s interpretation of economic inequality. Further, significant shifts in the introspection or extroversion of Philadelphia Yearly Meeting occur at these points, and the extent to which PYM is inwardly or outwardly focused affects its attention to social problems like economic inequality.

Finally, it is important to note from the outset, that I unexpectedly found that I could not tease out of the Quaker texts the ways in which social, political, and economic theories have influenced the Quaker tradition’s descriptions and analyses of economic inequality. The texts did not lend themselves to this type of analysis because their perspective is almost exclusively theological. Stated differently, when the texts did address social, economic, and political problems they did so from an almost exclusively theological perspective. Thus, the remainder of this chapter focuses on analyzing the ways in which the fundamental theological beliefs of the Quaker tradition have shaped the definitions and analyses of economic inequality put forth by this tradition, and how these beliefs have functioned in supporting and challenging economic inequality.

3.2 The Late Nineteenth Century

The nineteenth century was a time of introspection for the Quaker tradition, especially in the United States. A period of introspection had begun in both England and the United States at the beginning of the eighteenth century after the passing of the early

Quaker leaders. With the deaths of Robert Barclay in 1690, George Fox in 1691, Margaret Fell Fox in 1703, Friends became “more focused on the maintenance of good internal order, and less confident about proselytizing or making converts.” Further contributing to introspection in the United States, was the withdrawal from public life of Friends in Pennsylvania in the mid-eighteenth century. Here, Friends who had controlled the Pennsylvania legislature since its founding resigned instead of voting for war measures. This led to even more concentration on the internal life of the Society of Friends, particularly on defining “the rules and customs of a peculiar people.”

The inward turn created a “fertile ground for controversy,” which culminated in the Orthodox-Hicksite split in 1827. The divisive issues between the two groups were both theological and sociological. The Hickites, whose name is derived from the influential itinerant minister Elias Hicks, emphasized that Jesus was “the model of the life that all Christians ought to lead” and rejected the idea that “the Bible was the sole authority for Christians.” The Orthodox emphasized human redemption through the atoning death of Jesus on the Cross. While the Orthodox agreed with Hicks that the Bible “should not be put above the Spirit that gave it,” they also worried that “Hicks’s statements about overreliance on the Bible . . . diminished its unique inspiration and


191 Ibid., 29-30.


193 Ibid.

194 Hamm, *The Quakers in America*, 41.
indicated . . . pride.”\textsuperscript{195} Sociologically, there is some evidence that wealthy, urban Friends took an Orthodox position, while less well-to-do, rural Friends were attracted to the Hicksites.

\textbf{3.2.1 Philadelphia Yearly Meeting -- Orthodox}

The introspection that characterized nineteenth century Quakerism is evidenced in the texts of the Orthodox and the Hicksite groups, and thus neither the 1893 Orthodox \textit{Rules of Discipline} nor the 1894 Hicksite \textit{Rules of Discipline and Advices} paid attention to the growing problems of poverty and economic inequality worldwide. The bulk of the 1893 Orthodox text was devoted to guidelines for appropriate Quaker procedures regarding events like marriage and burial as well as guidelines for Meeting organization. The text did acknowledge poverty, but only by advising Friends to provide relief and assistance to poor members of the Meeting community.\textsuperscript{196}

\textbf{3.2.1.1 The Testimony of Simplicity Narrowly Construed as Plainness}

Introspection was also evidenced in the 1893 text’s treatment of the Quaker testimony of simplicity. Here, simplicity is narrowly construed as “plainness.” Friends were advised to be plain in their “speech, apparel, furniture, business, salutations, and conversation” because “it was their duty . . . to bear a testimony against the vain, corrupt, spirit of the world.”\textsuperscript{197} Thus, simplicity was not seen as a means to alleviating poverty or inequality, but rather as a means of setting Quakers apart.

\textsuperscript{195} Ibid., 40-2.

\textsuperscript{196} Yearly Meeting of Friends for Pennsylvania, New Jersey, Delaware, and the Eastern Parts of Maryland (Orthodox), \textit{Rules of Discipline} (Philadelphia: Yearly Meeting of the Friends for Pennsylvania, New Jersey, Delaware, and the Eastern Parts of Maryland, 1893), 120.

\textsuperscript{197} Ibid., 118-9.
3.2.1.2 The Testimony of Equality Narrowly Construed as Spiritual Equality

Introspection is also evidenced in the 1893 text’s treatment or lack of treatment of the testimony of equality. No section of the text was devoted to explicating the testimony of equality. Rather, the testimony of equality was most clearly applied in the text’s egalitarian claims about ministry within the Society. Specifically, the text claimed that anyone could be called to minister. The text noted:

   It is the prerogative of the blessed Head of the Church to dispense to whomsoever He will, both men and women, those gifts which He designs for its edification. And these gifts may be rightly exercised by any member of the congregation whom He may call to the service.\(^{198}\)

While the gendered language for the Divine weakened its claims for gender equality, this passage did nonetheless affirm the spiritual equality of Friends. This early notion of equality is important as a foundation for latter developments of the Quaker tradition’s testimony of equality. That is, in the nineteenth century, Friends were focused on the internal workings of their Society and the kind of equality that was most important in this context was spiritual. Friends were not concerned with economic equality within their Society in the nineteenth century because they did not consider economic equality necessary for spiritual equality. Yet later, in the late twentieth century, the Quaker tradition will connect the realization of equality with “independence and control over one’s life”\(^{199}\) and “a right sharing of the world’s resources.”\(^{200}\)

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\(^{198}\) Ibid., 93.


3.2.1.3 Trade, the Good Reputation of the Society, and a Nascent Spirituality of Work

Introspection is also evidenced in the 1893 text’s treatment of trade. Regarding trade, Orthodox Friends, like their Hicksite counterparts at the end of the nineteenth century, were concerned with the good reputation of their Society. The 1893 text advised members of the Society to punctually honor contracts and to not overextend themselves in business pursuits, not only because these were the morally correct courses of action, but also so that Friends would uphold the good reputation of the Society. Orthodox Friends were also, however, concerned with a spirituality of trade or business pursuits. That is, they advised against “an inordinate love of worldly riches” because this might lead to the “obstruction of the work of Truth in the heart.”

In other words, attachment to wealth could hinder one’s communication with God, leading one to prioritize worldly (material) rather than spiritual values. Thus, a spirituality of work was implied in the Orthodox advices regarding trade, which is an important resource for a Quaker ethic or relative economic equality.

3.2.1.4 The Peace Testimony as a Mark of Quaker Distinctiveness

Adherence to the Quaker peace testimony by mid-eighteenth century Pennsylvania legislators contributed to the continuation of the period of introspection that encompassed the late nineteenth century. When “open warfare” broke out in 1755, “the Friends who controlled the Pennsylvania legislature found themselves, for the first time, with the responsibility of defending the colony. Faced with the choice of upholding the

201 Yearly Meeting of Friends for Pennsylvania, New Jersey, Delaware, and the Eastern Parts of Maryland (Orthodox), Rules of Discipline, 145.

202 Ibid.
Quaker Peace Testimony or retaining power, many Friends chose the former. Enough withdrew from the legislature to give non-Friends a majority. And so Pennsylvania faced its first war.²⁰³

Adherence to the peace testimony set Friends apart as pacifists. Adherence to the peace testimony also had economic implications in that Friends were discouraged from “engaging in any trade or business promotive of war; sharing or partaking in the spoils of war by purchasing or selling prize goods; importing or shipping goods in armed vessels, paying taxes for the express purpose of war; grinding of grain, feeding of cattle, or selling property for the use of the army.”²⁰⁴ The Quaker tradition’s peace testimony will be an important resource for an ethic of relative economic inequality in that late in the twentieth century Friends will come to see economic inequality as a seed of war.

3.2.2 Philadelphia Yearly Meeting -- Hicksite

The Hicksite Rules of Discipline and Advices of 1894 similarly reflected the introspection that was prevalent in the Religious Society of Friends in the nineteenth century. In this text, the term “poverty” (let alone inequality) was not even used; rather, the text advised members of their branch of the Religious Society of Friends to help members in need.²⁰⁵

²⁰³ Hamm, The Quakers in America, 32.

²⁰⁴ Yearly Meeting of Friends for Pennsylvania, New Jersey, Delaware, and the Eastern Parts of Maryland (Orthodox), Rules of Discipline, 155.

3.2.2.1 The Testimony of Simplicity as a Mark of Quaker Distinctiveness

The Hicksites' treatment of the testimony of simplicity, or “plainness,” while evidence of introspection, is less obviously about Quaker distinctiveness than that of the Orthodox. While the 1894 Quaker text advised members of its branch of the Religious Society of Friends to “maintain a consistent bearing as members of the Religious Society of Friends in their business relations, as well as in every other walk of life,” it also indicated that the purpose of this was to “bear a testimony against the vain spirit of the world.” That is, Quaker spirituality – the lived expression of one’s faith – included conducting business in a particular, Quaker way. Thus the treatment of the testimony of simplicity was introspective, but introspective in relation to defining Quaker spirituality, more so than in presenting a distinct Quaker image to the outside world.

3.2.2.2 The Testimony of Equality as a Mark of Quaker Distinctiveness

There is little evidence in the 1894 Hicksite text of the testimony of equality. Unlike in the 1893 Orthodox text, there was no reference to gender equality in the discussion of ministry. Instead, emphasis was placed on the distinctiveness of Quaker ministry as founded on “human authority, relying for its qualifications on human abilities or learning” as contrasted with the special training of professional ministers. The testimony of equality is again implied, but the emphasis was on the equality of the educated and uneducated.

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206 Ibid., 39.
207 Ibid., 35.
3.2.2.3 The Peace Testimony as Friends’ Witness to the World

The 1894 Hicksite explication of the peace testimony is further evidence of the introspective character of nineteenth century Quakerism. The 1894 Book of Discipline noted that Friends “are called to show to the world in life and practice the blessed reign of the Messiah, the Prince of Peace.” This advice pertains to Friends’ witness to the world. It does not, like later texts, criticize the stances and actions of nations.

3.2.2.4 The Absence of a Testimony of Stewardship

Interestingly, there was no appeal to a testimony of stewardship as a means to alleviate poverty within the Religious Society of Friends or more broadly. There is, however, a brief section titled “Members in Need,” in which Monthly Meetings are urged “to have a standing committee . . . whose duty it shall be to see . . . that advice and relief are seasonably extended to members in need.” Concern for assisting members in financial need but not concern for poverty or economic inequality more generally is in part a function of the inward focus of the nineteenth century.

3.2.2.5 Trade, the Good Reputation of the Society, and a Nascent Spirituality of Work

The Hicksites, like the Orthodox, were concerned that members of their branch of the Society honor contracts and only venture in business within their means so that the good reputation of the Society would be maintained. Like the Orthodox, the Hicksite advice on trade also contained an implicit spirituality of work. The Hicksite branch of the Quaker tradition advised its members to “labor to content themselves with such a

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208 Ibid., 54.
209 Ibid., 68.
plain way and manner of living as is most agreeable to the self-denying principle which we profess, and most conducive to the tranquility of mind which is inseparable from the right enjoyment even of temporal things.”

Like the Orthodox spirituality of work, the Hicksite spirituality of work will be an important resource for a Quaker ethic of relative economic equality because it will inform a Quaker sense of moderation in work and in remuneration for work.

3.2.3 London Yearly Meeting

Because the introspection of the eighteenth century did not result in schism in the nineteenth century in England as it did in the US, London Yearly Meeting (LYM) began turning its attention outward earlier than Philadelphia Yearly Meeting. The beginning of an outward turn is evident in the 1883 edition of London Yearly Meeting’s *Christian Discipline*. In this text, while Friends were advised to care for poor Friends, they were also instructed to spend time visiting the poor more generally in their neighborhoods, to assess what they needed, and to relieve their wants.

3.2.3.1 The Testimony of Simplicity More Broadly Construed as a Spirituality of Moderation

Similarly, while LYM understood the testimony of simplicity as outward evidence of Friends’ otherworldliness, LYM’s 1883 *Christian Discipline* emphasized that simplicity was an aid to attaining “the blessed liberty that is in Christ.” That is, LYM did view simplicity manifested in plain dress and plain, honest speech as an outward sign

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210 Ibid., 56.


212 Ibid., 104-7.
that Friends were not of this world, but their main concern was that luxury numbs
spiritual faculties, thus interfering with the ability to be inspired by the Spirit and to live accordingly. Further, living simply had an outward focus in that LYM advised that luxury consumption could have a negative effect on those of moderate means who might be induced to over-consume in an effort to keep up and as such come to financial ruin.

3.2.3.2 The Testimony of Equality Narrowly Construed as Spiritual Equality

The testimony of equality is one place in which the outward turn was not yet developed. In LYM’s 1883 Christian Discipline, the testimony of equality was implicit and applied mainly to internal matters, such as ministry. That is, like the PYM Orthodox text of 1893, LYM’s 1883 text reminded Friends of the egalitarian nature of Quaker ministry. The text noted that “from the early rise of the Society, the Lord has been pleased to bestow [the] gift [of ministry] upon servants and handmaidens without respect of persons.” That is, without respect of social class, gender, or race. The testimony of equality has yet to be used as a lens through which to criticize social problems, but application of the testimony will develop in this direction in the late twentieth century.

3.2.3.3 The Testimony of Stewardship as a Means of Alleviating Poverty

More evidence of an outward turn in England is LYM’s presentation of the testimony of stewardship in 1883. The 1883 Christian Discipline emphasized Friends’ responsibility for care of others via stewardship. The text advised that Friends enjoyed

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213 Ibid.
214 Ibid., 106.
215 Ibid., 54.
economic and social advantages because of education and training and that they should use these for doing good. The text went on to indicate that stewardship was a means for remedying poverty. The text advised Friends to remember that they were but stewards and as such they ought to “discern how much of [their] income, or . . . property [they] ought to spare, and in what manner it may be well and wisely distributed for the good of others.”

The Quaker tradition will develop its interpretation and application of the testimony of stewardship; stewardship will become the Quaker tradition’s primary proposed means for alleviating poverty and economic inequality, which can be problematic depending on the form that stewardship takes. That is, stewardship in the form of philanthropy, may inadvertently support the maintenance of unjust structures that perpetuate rather than alleviate economic inequality.

3.2.3.4 Trade, the Good Reputation of the Society, and a Nascent Spirituality of Work

LYM’s advice on trade reflects a primarily inward orientation. Like Philadelphia Yearly Meeting, London Yearly Meeting was concerned in its 1883 text to advise Friends not to sully the reputation of the Society by overextending themselves in trade. LYM was primarily concerned, however, with the personal anxiety and distress that overextension might cause. This was reflected in London Yearly Meeting’s implicit spirituality of work. According to LYM, work was necessary in most cases to supply

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216 Ibid., 62.
217 Ibid., 127.
218 Ibid., 118.
“ordinary wants.” LYM advised that diligence in such work was good. Desires that exceed moderation, however, are bad and may lead to “anxious toil.” This advice is primarily for Friends themselves and thus directed inward.

3.2.3.5 The Peace Testimony Extended to Nations

The outward turning of LYM is evidenced again in its presentation of the peace testimony. On the one hand, the peace testimony was internal because it applied to Friends’ beliefs about violence and war – that they are never acceptable means of resolving conflict. On the other hand, the 1883 LYM text, stated:

As with individuals, so with nations, the beginnings of strife must be watchfully guarded against. To give occasion of offence or jealousy to the governments or to the inhabitants of other countries, whether by imputing evil motives, by needless alarms of invasion, or by anything approaching to a hostile attitude, is inconsistent alike with Christian duty and with true patriotism.

Here, then, the content of the testimony was not directed at individual Friends, but at nations. The testimony was explicitly political, cautioning against threats of invasion and hostile attitudes, and implicitly economic, cautioning against jealously, which seems likely to mean jealously over vast disparities in economic well-being.

In conclusion, because the nineteenth century remained a time of introspection for the Quaker tradition in the United States, the tradition, as represented by the Orthodox and Hicksite branches of Philadelphia Yearly Meeting, did not address social problems like poverty and economic inequality. While London Yearly Meeting was more outwardly focused, it did not identify economic inequality as a problem. In the late

\[\text{Ibid., 120.}\]
\[\text{Ibid., 120-1.}\]
\[\text{Ibid., 156.}\]
nineteenth century the Quaker tradition in both Philadelphia and London were most concerned about spiritual equality and did not see economic equality as a barrier to spiritual equality. LYM did, however, identify poverty and war as social problems via the Quaker testimonies of stewardship and peace. Further, the testimony of equality was implicit in both PYM’s and LYM’s presentation of an egalitarian ministry. The testimony of equality will also be important for the development of a Quaker theology of equality as well as a Quaker ethic of relative economic equality. Finally, PYM and LYM developed spiritualities of work via their testimonies of simplicity, which will be important resources for a Quaker ethic of relative economic equality.

3.3 The Early Twentieth Century

3.3.1 Philadelphia Yearly Meeting – Hicksite

By the early twentieth century, the focus of the Quaker tradition in the US had turned outward. In part, this can be explained by the coming together of the Orthodox and Hicksite branches of PYM in response to World War I. Both branches embraced the peace testimony as a lens through which to interpret the war and through which to craft appropriate responses to it. In 1917, representatives of PYM (Orthodox), Friends General Conference (Hicksite) and others came together to form the American Friends Service Committee, which created an avenue through which Friends of various persuasions could “reaffirm the peace testimony by providing conscientious objectors an alternative to fighting, give Friends at home a method of witnessing to their faith in wartime, and accomplish social reconstruction abroad.”

222 Barbour and Frost, The Quakers, 252.
The outward turn is reflected in the 1927 Hicksite Book of Discipline, which not only identified poverty as a social problem, but also noted that poverty might be caused by “unjust conditions” and cautioned Friends that unjust conditions might be “intensified . . . by [their] own thoughtless conduct.” This represents an outward turn because the focus of the advice was not only on Friends’ conduct and how this conduct reflected on the Society, but the advice was also concerned with unjust social conditions in which Friends participate and by so participating inadvertently make the problem of poverty worse. For example, a part of this advice was to “consider how [one’s] way of spending money affects others. [The Christian] will endeavor to share his advantages and will guard against pursuing a mode of life that ministers only to his own comforts.” Thus the advice was not focused on upholding the good reputation of the Society but rather on Friends’ wider social obligations. In retrospect, the advice can be understood as foreshadowing a concern for Friends’ inadvertent participation in unjust social structures.

3.3.1.1 The Testimony of Simplicity More Broadly Construed as a Spirituality of Moderation

Explication of the testimony of simplicity in the 1927 text is also evidence of the outward turn of the Hicksite branch of the Quaker tradition in the US. The 1927 Hicksite Book of Discipline advised that Friends “keep themselves free from self-indulgent habits, luxurious ways of living, and the bondage of fashion” because “undue luxury often creates a false sense of superiority, causes unnecessary burdens upon both ourselves and

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224 Ibid., 36.
others, and leads to neglect of the spiritual life.”225 While this interpretation of the testimony of simplicity continued to speak to the appropriate conduct of Friends, it also indicated concern for the well-being of “others.” The attention to others, non-Friends, is another indication that the Hicksites were beginning to turn outward, considering the problems of the wider world and the ways in which the fundamental Quaker testimonies could help Friends interpret and understand these problems.

3.3.1.2 The Absence of the Testimony of Equality

Explication of the testimony of equality remained nascent in the 1927 Hicksite Book of Discipline and therefore is not evidence of an outward turn. Like the 1894 Hicksite text, the 1927 Book of Discipline did not reference the testimony of equality. In the discussion of ministry, the most likely place to find an appeal to equality before the late twentieth century, the 1927 text subtly indicated that human beings are equal in their potential to be called as ministers. The text noted:

[V]ocal ministry in the Meeting for Worship . . . arise[s] out of a personal call to service. . . . [Friends’] conviction is that the Spirit of God is in all, and that vocal utterance comes when this Spirit works within us. . . . Therefore, we do not set anyone apart whose special duty it is to supply the spoken word in our meetings.226

While this discussion of ministry implied gender and socio-economic equality within Quaker ministry, the discussion neither overtly invoked the testimony of equality nor did it indicate that the testimony of equality could and should be used as a lens for analyzing social problems.

225 Ibid., 30-1.
226 Ibid., 22-3.
3.3.1.3 The Peace Testimony Extended to Nations

The peace testimony served to unite disparate strands of the Quaker tradition, leading to the outward turn of the Hicksite branch of PYM in the early twentieth century. Explication of the peace testimony in the 1927 Hicksite Book of Discipline is evidence of the outward turn of the Hicksite branch of the Quaker tradition in the early twentieth century. Here, the Hicksite text, like the earlier 1883 LYM text, noted “God’s law of love . . . is applicable to nations as well as to individuals. Because of this application, war as a means of settling differences between nations becomes morally unlawful.”227 No longer do PYM (Hicksite) Quakers view the peace testimony as strictly a guide for Friends’ practice. Now, the Quaker tradition in the US is using its peace testimony to criticize the stances and actions of nations. Further, in the 1927 text, the Hicksite branch of the Quaker tradition used its peace testimony to proscribe trade practices, threats of invasion, and the accumulation of arms as actions which contribute to a spirit of war.228 Again, this interpretation of the peace testimony was directed outwardly, to nations. The peace testimony will become an important resource for a Quaker ethic of relative economic equality as the Quaker tradition comes to understand economic inequality as a seed of war in the late twentieth century.

3.3.1.4 Trade Practices as a Means to Improved Compensation and Conditions for Workers

Most significantly, the 1927 Hicksite text, instead of appealing to stewardship or philanthropy as a means of alleviating poverty and instead of emphasizing trade practices that bear witness to Quaker honesty and integrity, called upon Friends and other

227 Ibid., 61.
228 Ibid., 62.
employers to provide adequate working conditions, compensation, and benefits for their employees. The text advised:

All employees should be assured of reasonable working hours, freedom from arbitrary requirements, safe and sanitary working conditions, wages permitting them and their families to live in self-respect and comfort, and to obtain adequate facilities for education and wholesome recreation. Careful attention should be given to the need for employees for protection in cases of unemployment and sickness.\textsuperscript{229}

Interestingly, while the peace testimony was directed explicitly to nations, the advice about employer-employee relations seems to be directed to Quaker business owners, not business owners as a whole. While this in many ways seems parochial and inwardly focused, the advice represents an outward turn because it is not focused on upholding the good reputation of the Society. Rather, it is focused on the proper relationships between Quaker employers and employees, whether Quaker or not. The broad concern for the conditions of employees will be an important motivation for the development of a Quaker ethic of relative economic equality.

3.3.2 Philadelphia Yearly Meeting -- Orthodox

Not unexpectedly, the 1935 Orthodox \textit{Faith and Practice} was still somewhat concerned with Quaker distinctiveness and thus internally focused. This is not surprising because orthodoxy in any tradition pertains to maintaining the distinctiveness – doctrinally and otherwise – of that particular tradition. The testimonies of simplicity and peace were employed internally to describe and by describing to shape Quaker distinctiveness. At the same time, in the 1935 \textit{Faith and Practice}, the Orthodox began to apply their testimonies of equality, simplicity, and stewardship to external social

\textsuperscript{229} Ibid., 52-3.
problems such as inequality in housing and the need for a more equitable distribution of industrial profits.

3.3.2.1 The Testimony of Simplicity Somewhat Narrowly Construed as Guiding Friends’ Behaviors

Evidence of the continued internal focus of the Orthodox branch of the Philadelphia Yearly Meeting in 1935 is found in its explication of the testimony of simplicity. Here, the testimony of simplicity is directed toward guiding the behavior of Friends so that they will be “better servants of Christ.” Friends are advised against “possessions or activities that capture the heart and lures of business, knowledge, fame, or social pleasure that lessen [Friends’] simple and steadfast devotion to the Kingdom of God.”

3.3.2.2 The Absence of the Testimony of Equality

There is no explicit explication of the testimony of equality in the 1935 Orthodox text. Normally, allusions to equality would be found in discussion of ministry, but in 1935, the Orthodox chose to focus on the history of spontaneous ministry in the Quaker tradition and the need for a teaching ministry, “which is given out of a long preparation of thought and experience, but which waits for the guidance of the Spirit to know when, where and how it shall be uttered.” The need for a teaching ministry stems from the Orthodox concern to maintain Quaker distinctiveness. Thus, the focus was internal and

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231 Ibid., 33.

232 Ibid., 7.
less egalitarian as the Orthodox emphasized privilege in ministry accompanying education.

3.3.2.3 The Peace Testimony More Narrowly Construed

While the peace testimony had served to draw Orthodox and Hicksite Friends together at the beginning of the twentieth century and while the peace testimony served as a basis for Orthodox Friends’ participation in the formation of American Friends Service Committee in 1917, Orthodox Friends’ explication of the peace testimony in the 1935 Orthodox Faith and Practice seemed to emphasize a latent internal focus of the Orthodox. Explication of the peace testimony in the 1935 Orthodox Faith and Practice indicated that the peace testimony should guide Friends stance and actions, but did not indicate that it should be used as a lens for evaluating and prescribing the appropriate stance and actions of nations. The 1935 text repeated the 1660 Declaration that Friends “deny all outward wars and strife, and fighting with outward weapons, for any end, or under any pretenses.” Importantly, the Quaker witness for peace was interpreted as requiring Friends to “eradicate the seeds of war in one’s daily life” as well as to abstain from bearing arms. Thus the advices regarding bearing arms and eradicating the seeds of war were both directed toward guiding the behavior of Friends, which can have an external, social impact. Nonetheless, the Orthodox did not apply the peace testimony to nations as LYM had in 1883 or as the Hicksites had in 1927.

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233 Ibid., 29.
234 Ibid., 31.
3.3.2.4 Identification of “Some Problems of the Social Order”

Importantly, the 1935 Orthodox *Faith and Practice* began to turn outward in its identification and discussion of “Some Problems of the Social Order.” Here, the Orthodox text identified the problem of inequality in housing: “In our cities there are luxurious residences in one section and tenements and slums in another.” Further, the 1935 Orthodox text expressed concern for upholding the dignity of human beings in light of the division of labor in factory work and for the lessening of a sense of moral accountability as the individual owner’s control of business had been replaced by the control of stockholders and their representatives. Furthermore, the 1935 Orthodox text expressed concern for “a more equitable distribution of the income of industry.” While the Orthodox *Faith and Practice* does not indicate a reason for these concerns, Barbour and Frost note that in the 1920s “the root causes of war were increasingly seen . . . as class conflict, racism, militarism, capitalism, imperialism, and nationalism.” It seems possible, perhaps likely, that Friends are beginning to identify inequality, particularly inequalities in housing and income, as seeds of war.

Interestingly, the Orthodox text interpreted the problem of inequality in housing via the lens of Christian charity. That is, the text advised Friends that Jesus “revealed that love is the deepest and truest relationship among all men. Such a love identifies us

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235 Ibid., 51.

236 Ibid., 52-3.

237 Ibid., 55

238 Barbour and Frost, *The Quakers*, 263.
with one another and makes us share in one another’s needs.”

Thus, the means for alleviating unequal housing was for people (not just Friends) to sympathize with each other.

The 1935 Orthodox Faith and Practice evaluated the problems of upholding human dignity in the workplace and the inequitable distribution of income in light of the Quaker tradition’s theological anthropology and its testimonies of simplicity and stewardship. First, the foundation for the Quaker tradition’s concern about working conditions and distribution of income was its egalitarian theological anthropology. The Orthodox branch of the Quaker tradition affirmed that “every individual shall have ample opportunity for the development of his personality and usefulness.”

Quaker concern for equal opportunity for the development of personality was rooted in the tradition’s belief that all human beings have the Light of Christ or the Seed of God within them. Therefore, to stifle a human being’s development is to suppress the Divine within them. The consequence of hindering the development of any human being means risking missing communication with the Divine via that person.

In order to facilitate human development, the text noted the necessity of “comfortable and healthy homes, adequate education, suitable recreation, [and] provision for old age and disability, and for reasonable security and freedom.” In order to facilitate distribution of these necessities to all, the 1935 text advised that Friends should

\[\text{\small \text{\cite{239}}}\]


\[\text{\small \text{\cite{240}}}\]

Ibid., 54.

\[\text{\small \text{\cite{241}}}\]

Ibid., x.

\[\text{\small \text{\cite{242}}}\]

Ibid., 54.
“strive to keep [their] homes and lives simple and to avoid comforts and luxuries which do not contribute to [their] welfare” and that “those who have incomes in excess of their needs . . . should treat their wealth as held in stewardship for God.” As good stewards, Friends “should not wish to receive more than a moderated return on capital, or salaries greater than [they] need in order to provide for [their] families in simplicity.” The implication of these passages is that by living simply and being good stewards of their wealth, Friends can promote a better distribution of basic goods and as such promote human development, which is the means to a better spiritual life for all.

In addition to personal choices made in light of the testimonies of simplicity and stewardship, the 1935 text also recommended legislation for a living wage and unemployment insurance as well as employee representation in the management of businesses in order to guarantee “a more equitable distribution of the income of industry.” The emphasis here was on the cooperation of “all who are engaged in industry” because the Quaker tradition understood all work – whether labor or management – as oriented toward the common good. Importantly, this advice was outwardly political, evidence of the increasingly outward turning of the Orthodox branch of Philadelphia Yearly Meeting.

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243 Ibid.
244 Ibid., 55.
245 Ibid.
246 Ibid., 55-6.
3.3.3 *London Yearly Meeting*

London Yearly Meeting continued looking outward in the early twentieth century. LYM’s 1925 *Christian Practice* identified poverty and unemployment as social problems.\(^{247}\) The 1925 LYM text also criticized “the possession of wealth and the power derived from wealth” as dulling the “sense of social justice in . . . owners” and as such hindering “their opportunities for spiritual work.”\(^{248}\)

3.3.3.1 *The Testimony of Simplicity Construed as a Lens for Interpreting Poverty*

The 1925 LYM text used the testimony of simplicity as a lens for interpreting and proposing solutions to the problem of poverty. The 1925 LYM *Christian Practice* understood the ability to live in luxury as a product of unnecessary labor.\(^{249}\) The Quaker tradition, going back to John Woolman and William Penn in the eighteenth century, believed that if labor was used to produce necessities instead of luxuries, the basic needs of all would be met. In other words, the Quaker tradition proposed simplicity, or living simply, as the solution to meeting the basic needs of all. If there was no market for luxury goods, the resources used to produce such goods would be redirected into producing necessary goods and then there would be enough basic goods for all. While the analysis of the problem of poverty will change in the mid-twentieth century – i.e., the problem is not the production of sufficient basic goods, but rather the distribution of them – the Quaker tradition will continue to evaluate the problem in light of its testimony of simplicity.

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\(^{248}\) Ibid., 136

\(^{249}\) Ibid., 115.
3.3.3.2 The Testimony of Equality More Broadly Construed to Include Racial, Gender, and Social Equality

The application of the testimony of equality to social problems also testifies to LYM’s outward focus in its 1925 Christian Practice. LYM’s 1925 text indicated that racial, gender, and social equality are the foundations for the social order. LYM was primarily concerned with human beings’ opportunities for physical, moral, and spiritual development. Importantly, while the text expressed concern for the economic well-being of persons, economic equality was not yet a goal. That is, the text noted: “The ownership of material things, such as land and capital, should be so regulated as best to minister to the need and development of man.”

3.3.3.3 The Peace Testimony – Continuing the Application to Nations

Like its earlier 1883 text and the PYM Hicksite text of 1927, the LYM 1925 Christian Practice applied the peace testimony to individuals and nations. The text noted:

As Christians we cannot recognize two doctrines, one for individuals between themselves, and another for nations. The morality which Christianity claims from men in their intercourse with one another, is surely no less binding on them, when they are called to act in the name of and on behalf of their country.

In this text, the peace testimony has not yet been connected to economic problems, but the idea that the peace testimony can be used to evaluate external social issues has been reinforced.

\[250\] Ibid., 134.
\[251\] Ibid., 135.
\[252\] Ibid.
\[253\] Ibid., 145-6.
3.3.3.4 The Testimony of Stewardship Narrowly Construed as Philanthropy

The theme of stewardship was also present, but not emphasized, in the 1925 LYM text. The 1925 LYM Christian Practice encouraged Friends to “cultivate a true liberality according to their means.”\(^{254}\) Thus, Friends were encouraged to give generously but philanthropy was not explicitly proposed as a means for alleviating poverty or economic inequality.

3.3.3.5 Business Practices and the Relationship between Employers and Employees

The 1925 LYM text also reiterated the importance of honesty in business,\(^ {255}\) but like the PYM texts, it emphasized the responsibility of employers to employees, particularly the obligation to pay a just wage and to provide job security.\(^ {256}\) Interestingly, LYM also noted the obligations of employees to employers: “to render good service, and deal with their employers’ time and property as with their own.”\(^ {257}\)

3.3.3.6 A More Developed Spirituality of Work

Elements of a spirituality of work are also present in the 1925 LYM text. The text understood work to be more than making an income. Through work, “the Christian must seek the good of others, and of the community at large, not simply of himself and his family.”\(^ {258}\) Further, in relation to the accumulation of material goods via work, the 1925 LYM text advised that there is danger in “how much [one’s] heart is set upon what one

\(^{254}\) Ibid., 117.

\(^{255}\) Ibid., 108.

\(^{256}\) Ibid., 119.

\(^{257}\) Ibid.

\(^{258}\) Ibid., 118.
has, and upon accumulating more.”

Like earlier articulations of elements of a spirituality of work, the ideas that accumulation is spiritually dangerous and that work must benefit the community as a whole, will be important resources for a Quaker ethic of relative economic equality.

In conclusion, the early twentieth century was a time of turning outward for the Quaker tradition. In the early twentieth century, the Quaker tradition moved from an emphasis on prescribing trade practices that upheld the reputation of the Society, to advocating adequate working conditions, compensation, and benefits for all workers. In the early twentieth century, the Quaker tradition employed its testimonies of simplicity and stewardship to prescribe solutions – such as moderating consumption and including workers’ representatives in the management of business – to poverty and economic inequality. The tradition moved from applying its peace testimony solely to members of the Society of Friends to using the peace testimony as a lens in which to evaluate the conduct of nations. Finally, and most fundamentally, in the early twentieth century the Quaker tradition began to interpret the social order and its problems via the lens of its egalitarian theological anthropology, which emphasized social, gender, and racial equality.

3.4 The Mid Twentieth Century

3.4.1 Philadelphia Yearly Meeting – The Testimony of Equality Evaded

In 1955 the Orthodox and Hicksite branches of the Philadelphia Yearly Meeting of the Religious Society of Friends reunited. The theological divisions that were the impetus for the separation had waned and as both groups had experienced declines in

259 Ibid., 116.
membership reunification “appealed to a sense of economy and efficiency.” It is not surprising, then, that the 1955 edition of *Faith and Practice* focused on unity, both internal and external. The 1955 text drew on and combined elements of earlier editions from the Orthodox and Hicksite groups. It is unsurprising, then, to see the 1955 text restate the 1935 Orthodox identification of social problems, and to find that the application of the testimonies of simplicity and peace are directed inwardly and outwardly.

Most interesting as a resource for a Quaker ethic of relative economic equality and a Quaker theology of equality is the 1955 *Faith and Practice*’s discussion of unity. The 1955 text “reaffirm[ed] the [fundamental Quaker] belief that all men are children of the one Heavenly Father” and the ideal that “every person . . . [is] of infinite worth.” The text went on to suggest that these fundamental bases of unity ought to mitigate national, racial, and religious factionalism. Further, the text advised that the Quaker commitment to unity ought to guide “the choice of vocation, matters of income and consumption of goods, and attitudes and practices towards those differing in race, sex, religion, nationality, political beliefs, [and] social position.”

This discussion of unity danced around, bumped up against, and evaded notions of equality. That is, the ideas that all human beings are children of God and all human beings have infinite worth implied that human beings are equal, but the text did not make that claim. Instead, the text advised Friends to think in terms of unity across racial,

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260 Hamm, *Quakers in America*, 61.


262 Ibid., 36-7.

263 Ibid., 37.
gender, religious, national, political, and social lines. It is possible that advice about unity was less threatening in 1955 than robust claims about human equality because debate about racial equality was heated. It is also possible that PYM had not reached unity within in the Yearly Meeting on more robust claims about human equality. PYM will make more substantial claims about human equality at the end of the twentieth century.

3.4.2  *London Yearly Meeting – A New Interpretation of the Requirements for Living a Socially Responsible Life*

The 1960 LYM *Christian Faith and Practice* stressed tolerance and diversity within the Religious Society of Friends. The introduction to the text noted that the purpose of the text was “to make Friends aware of their inheritance.” As such it is of little surprise that the text is a compendium of beliefs, with very little systematic reflection on or development of ideals. The text did not identify new social problems that necessitated reflection nor did it develop the testimonies of simplicity, equality, peace, or stewardship.

The most notable development is a new conception of what is required to live a socially responsible life. The text noted:

A socially reformed life, which rejects all that is inseparably linked with injury to others, will necessarily involve self-sacrifice, but this is not an end in itself and is only demanded when some useful purpose is served. The limitation of personal expenditure on clothes to an irreducible minimum does not release clothing for another. It may, as things are, impoverish the tailor or dressmaker. The effort should be to promote the

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participation of all in the abundance of the age rather than the extension to all of the privations of the past.\textsuperscript{265}

This excerpt called into question older justifications for simplicity – i.e., that limiting production and consumption to necessities would lead to the sufficient production of necessities to meet the basic needs of all. The new interpretation of what is required to live a socially responsible life implies that given the system, we may be forced to consume so that others can produce. Importantly, this implies that Friends accept the system. Equally importantly, spiritual justifications for simplicity – that attachment to material goods or attachment to the pursuit of more than one needs inhibits pursuit of the Kingdom of God – remained the same.

In conclusion, the most important developments in the Quaker tradition in the mid twentieth century pertaining to an ethic of relative economic equality and a theology of equality are the emphasis on unity drawn from the reunification of the Orthodox and Hicksite branches of Philadelphia Yearly Meeting and the rethinking of the means for achieving distributive justice. Reflection on unity, particularly externally as it pertained to those of different races, genders, and classes, is a prelude to Quaker reflection on equality, especially economic equality. A rethinking of the means of distributive justice that implicitly accepts current economic structures indicates the conceptual challenges that may currently constrain a Quaker ethic of relative economic equality.

\textsuperscript{265} Ibid., 534.
3.5 The Late Twentieth Century

3.5.1 Philadelphia Yearly Meeting – The Testimony of Equality More Broadly Construed

After reunification of PYM in 1955, this Yearly Meeting was in a better position to address external social problems. That is, even though the Meeting had begun to look outward in the early twentieth century (exemplified in the formation of the American Friends Service Committee in 1917), internal matters – particularly working towards reunification of the Hicksite and Orthodox branches – consumed much of PYM’s attention from 1900-1955.

The most important textual development pertaining to the interpretation of economic inequality in late twentieth century Quaker thought of Philadelphia Yearly Meeting is the enunciation of the principle of equality in PYM’s 1972 *Faith and Practice*. Subsumed under the discussion of “Human Brotherhood,” PYM for the first time linked its egalitarian theological anthropology with a social principle of equality.

In the 1972 *Faith and Practice* PYM reaffirmed:

> Everyone is a child of God. Therefore, all must relate to one another in terms of the Divine spark within each. Everyone must be regarded as of infinite worth and must be treated as a person who can be drawn by love to live a full and worthwhile life which manifests respect and consideration for others.\(^{266}\)

PYM acknowledged national, racial, religious, and social differences among human beings but asserted that these should not become “the basis for feelings of superiority or inferiority.”\(^{267}\) These passages represent a concise summary of the Quaker tradition’s

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\(^{267}\) Ibid., 32-3.
theological anthropology: all human beings are children of God. As such, all have the
Divine spark within. Because human beings are children of God and have the Divine
spark within them, all human beings have infinite worth. As children of God, with the
Divine spark within, and as having infinite worth, all human beings must be treated with
respect.

PYM went on to claim:

Enunciation of the principle of equality among human beings in the
sight of God is important and necessary, but it is not sufficient.
Realization of equality involves such matters as independence and
control of one’s own life. Therefore, Friends must aid the efforts of
the exploited to attain self-determination and social, political and
economic justice, even when their attainment involves changes in
attitudes and practices formerly taken for granted.  

The connection of the idea of infinite human worth to the principle of human equality and
further the principle of equality to economic justice is significant. PYM indicated that
the principle of equality is the basis for economic justice because it is through economic
(as well as social and political) justice that human beings realize equality. The principle
or testimony of equality will be the single most important resource for the development
of a Quaker ethic of relative economic equality and a Quaker theology of equality.

The latest substantial revision of PYM’s Faith and Practice occurred in 1997. Instead of subsuming its treatment of equality under a broader discussion of “Human
Brotherhood,” the 1997 Faith and Practice identified and treated “equality” as one of six
key Quaker testimonies. The text noted:

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268 Ibid., 33.

269 There was another revision in 2002, but the changes from 1997 to 2002 are not significant.

270 The other testimonies treated are social justice, criminal justice, peace, the individual and the
state, and stewardship. See PYM 1997, 74-81.
We believe there is that of God in every person, and thus we believe in human equality before God. Friends pioneered in recognizing the gifts and rights of women. Women were ministers and leaders of the early meetings. Friends came more slowly to recognize the evil of slavery and of discrimination in general, and have often been guilty of sharing the prejudices of the broader society. In recent years, Friends have discovered and taken stands against other forms of discrimination and oppression to which they had earlier been insensitive. An element of that insensitivity for some has been a failure to recognize the privileged status many American Friends enjoy. As we continue to seek the Light, ingrained habits and attitudes are subject to searching reexamination.271

Here, PYM connected its egalitarian theological anthropology with its history of promoting gender and racial equality and with its recognition that the “privileged” status of American Friends may mitigate against equality. Read in conjunction with the 1997 text’s description of the testimonies stewardship and right sharing, the “privilege” referenced here is at least in part economic privilege. The text indicates a willingness to think about how Friends have been insensitive to other kinds of inequalities, especially those that lead to privilege for some and disadvantage for others – like economic inequality.

The 1997 *Faith and Practice* further built upon the 1972 edition by explicitly defining a testimony of social justice (in the 1972 text this was subsumed under the discussion of “Human Brotherhood”). The 1997 testimony of social justice began with the 1972 claim that “enunciation of the principle of equality among human beings in the sight of God is important and necessary, but it is not sufficient.”272 The 1997 text, again repeating and building on the 1972 text, went on to explain what might be required to realize equality:


272 Ibid.
Realization of equality involves such matters as independence and control of one’s own life. Therefore Friends aid the nonviolent efforts of the exploited to attain self-determination and social, political, and economic justice, and to change attitudes and practices formerly taken for granted. Friends seek to bring to light structures, institutions, language, and thought processes which subtly support discrimination and exploitation. Beyond their own Society, Friends promote Spirit-led, sense of the meeting decision-making as an instrument of equality. And Friends continue to examine their own attitudes and practices to test whether they contribute as much as they might to social, political, and economic justice.273

Here, there is more evidence of Friends turning outward and using their testimonies of equality and social justice to understand and correct inequalities. Friends are advised to use their testimonies of equality and social justice to expose structural injustice (as foreshadowed in the 1927 Hicksite Book of Discipline, 157-9) as well as attitudes or thought processes that promote, intentionally or unintentionally, inequality. Importantly, PYM indicated that in addition to using Friends’ testimonies to expose inequality, Friends use their decision-making process beyond their own Society to support equality.

In brief, Friends’ decision-making process, used in their meetings for business, is seen by Friends as an extension of worship. As Howard Brinton notes, “The meeting for worship is focused upon the divine-human relationship [while] the meeting for business is mainly concerned with interhuman co-operation.”274 Thus, “the meeting for business should . . . be preceded by a period of worship in which the hard shell of egocentricity is dissolved and the group united into a living whole.”275 Friends strive in their meetings

273 Ibid.
275 Ibid.
for business to make decisions by reaching unity. Brinton indicates how and why the process may fail:

Some members [may] not have achieved the right attitude of mind and heart. Dogmatic persons who speak with an air of finality, or assume the tone of a debater determined to win, may be a serious hindrance. Eloquence which appeals to emotion is out of place . . . . Opinions should always be expressed humbly and tentatively in the realization that no one persons sees the whole truth and that the whole meeting can see more of Truth than can any part of it.\(^{276}\)

While this process is not wholly applicable to a secular context, the element of the process that most reinforces a commitment to equality is the commitment to hearing every voice and believing that every voice – regardless of race, gender, social or economic class – has the potential to communicate an element of the truth.

Explication of the peace testimony in the 1997 edition of PYM’s *Faith and Practice* was outward looking and progressive in terms of identifying forms of violence other than physical violence. The 1997 text advised Friends to “make strenuous efforts to ensure international agreements for the elimination of armaments and to remove the domination of militarism from our society.”\(^{277}\) The text also noted that “the peace testimony requires [Friends] to honor that of God in every person, and therefore, to avoid not only physical violence but also more subtle forms – psychological, economic, or systemic.”\(^{278}\) The understanding that violence can be economic is an important resource for a Quaker ethic of relative economic equality because it serves as a motivation for setting moral limits on economic inequality.

\(^{276}\) Ibid., 132.


\(^{278}\) Ibid., 77.
Interestingly, in PYM’s 1997 *Faith and Practice* the testimony of simplicity is subsumed under the testimony of stewardship. This development represents the outward focus of PYM at the end of the twentieth century. That is, instead of describing the testimony of simplicity in dress or manner as necessary marks of Quaker distinctiveness, simple living was instead put forward as a mark of good stewardship that results in a better sharing of the world’s resources.\(^{279}\) For example, the 1997 text advises

Friends need to examine their decisions about obtaining, holding, and using money and other assets, to see whether they find in them the seeds, not only of war, but also of self-indulgence, injustice, and ecological disaster. Good stewardship of economic resources consists both in avoidance of those evils and in actions that advance peace, simple living, justice, and a healthy ecosystem.\(^{280}\)

3.5.2 *London Yearly Meeting*

The 1999\(^ {281}\) revised LYM (now *Britain Yearly Meeting*, or BYM) text is much like the 1960 LYM text in that it is an unsystematic compendium of extracts from earlier Quaker texts. This reflects BYM’s desire to be inclusive:

Words must not become barriers between us, for no one can ever adequately understand or express the truth about God. Yet words are our tools and we must not be afraid to express the truth we know in the best words we can. It is this conviction which has prompted the selection of a wide variety of extracts for inclusion in this book, confirming our testimony that truth cannot be confined within a creed.\(^ {282}\)

Buried within the lengthy twenty-third chapter on “Social Responsibility” are some reflections on equality. First, there is a claim that the equality of all human beings is

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\(^{279}\) Ibid., 80.

\(^{280}\) Ibid.

\(^{281}\) The text was substantially revised in 1995. A second edition, with modest revisions was approved 1995-98 and published in 1999. In this section I use and cite the second edition published in 1999.

grounded in God’s love for each individual. Second, this affirmation of a fundamental human equality is connected to social policies: “The belief in the equality of all human beings of whatever sex, race, class or age . . . . requires policies, not of equal opportunities (which redistribute inequality) but of equality.” This excerpt was concerned particularly with equality in education, and recommended organizing schools “for cooperation rather than competition, and for affirming people in their successes rather than their failures.”

While BYM as a whole has not systematically moved to support, either in theory or practice, relative economic equality, the 1999 text cited important examples of individual and corporate attempts to challenge economic inequality in the Quaker tradition. This may be a precursor to the meeting itself developing its testimony on equality to include economic equality. That is, the individual examples may prompt discussion, reflection, and development by the meeting as a whole. Conversely, it could be that the individual examples serve to make-up for the lack of attention to economic inequality by the corporate body. Either way, the corporate significance of these examples is evidenced by their recording in the text.

The vignettes raise questions about potential Quaker motivations for pursuing relative economic equality and Quaker means of achieving relative economic equality at the end of the twentieth century. The first narrative is about Douglas Smith, warden of Settle Meeting House. Mr. Smith inherited a large sum of money, which he could have

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283 Ibid., 23.73.
284 Ibid.
285 Ibid.
chosen to use for his own security and pleasure. Instead, he gave this money to charities and trusts working in the former British colonies. The following statement explaining his choice was published in 1981 by Mr. Smith’s request after his death:

Much of our present affluence in Britain was built on the cheap labour, inadequate food, poor housing, poor medical and social services and almost non-existent education of the people of our former Empire. When they demanded their freedom, we cleared out, leaving them almost totally unfitted for stable self-government and without adequate capital to develop their own resources.

Every one of us in Britain, even the poorest, has reaped the benefits of many kinds from the misery and poverty of our Empire. We are all deeply in debt. Governments, trade unions, politicians and churches have talked loud and long about justice and the brotherhood of mankind. We have handed over to them our personal responsibility to achieve these aims, but with tragic lack of success.

Now we must act; take new and revolutionary action at the level of our personal responsibility to give back to the world’s poor the wealth of which we have robbed them and are still robbing them. Unless we take our Christian responsibility for closing the gap between our comfort and their misery, we shall blunder deeper and deeper into world-wide disasters – and probably to self-destruction.

For fifty years these injustices have weighed on my conscience. Then in 1979 I acquired considerable wealth, and immediately I was faced inescapably with the Christian challenge to repay as much as possible of the wealth which Britain had taken from the world’s poor. I gave away almost all the money to charities and trusts working in the former British possessions. This brought me to the financial level of the old-age pensioner, but with no regret. The pension leaves us room for happiness, contentment and laughter. Compared with an Indian or African peasant, our pensioner is princely rich.

The personal responsibility which we hand over to governments, trade unions, committees and churches has failed to banish world poverty. I hope this statement will lead others to think deeply of their personal responsibility towards all the world’s problems and to take action now; sacrificially – guided by the Christian spirit of deep caring.\textsuperscript{286}

\textsuperscript{286} Ibid., 24.52.
While Mr. Smith conflated the problems of poverty and inequality, he was clearly concerned about the gap (his term) between the wealth of the British and the poverty of those living in former British colonies. This narrative illustrates individual Quaker concern for and action to alleviate economic inequality and skepticism about ceding this responsibility to institutions; it raises the issue of personal versus social responsibility.

Mr. Smith indicated that his motivations were broadly Christian, but British Friends cite this story as a contemporary example of an individual living the Quaker peace testimony. While the Quaker peace testimony originated in the seventeenth century as an assurance to the British government that Friends would not take up arms against it, by the end of the twentieth century, Friends were interpreting the peace testimony as a guide to resolving tension and conflict “in all their forms.” Mr. Smith’s story indicates that one form of tension or violence that concerns Quakers is economic inequality.

The 1999 BYM Faith and Practice also cites the 1% Fund as a contemporary example of a corporate expression of the peace testimony. In 1967, the World Conference of Friends asked yearly meetings of Friends throughout the world to set aside one percent of their income to help the poorer nations of the world. The motivation for the suggestion of a 1% Fund was the World Conference’s concern about economic inequality. In establishing its own 1% Fund in 1968, LYM gave the following rationale:

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289 World Conferences of Friends are periodic gatherings of Friends from throughout the world for the purpose of communication. World Conferences of Friends have no formal authority in matters of faith or practice. The first World Conference of Friends was held in 1920. There have been five subsequent conferences; the last was held in 1991.
We know that the world’s resources are neither developed to the full nor used to the best advantage. The inequality in the distribution of goods and services between nations and between individuals within nations stares us in the face.

If we are to face these issues aright we are called to re-examine our whole way of life. At the personal level we must ask ourselves how we spend our time, and how we use the talents God has given us in earning a living, remembering that in spending we are asking others to use their resources in our service.

As members of the Society of Friends we must ask the same question about the resources of our Society: as members of a nation and of the community of nations we must be alive to the fact that ours is among the rich countries of the world, yet devotes but a small fraction of the national income to help the less developed countries.

We commend to the further consideration of Friends . . . the continuing need for personal service. We are concerned from this session to ask all Friends who feel able to do so to give a further one per cent of their income to helping the poorer nations.  

LYM’s 1% Fund operated until 1989. At its height, fifteen hundred households supported it. By 1989, fewer than five hundred subscribers did. By its own estimation, “the yearly meeting had failed to respond to the call to demonstrate to the Government that the public would support more taxation for international aid.” There are no published explanations of why LYM could not motivate this behavior. It is possible that Friends felt too far removed from international economic inequality. That is, Quaker worship and fellowship is rooted in small groups with much face-to-face personal interaction and relationship. Further, the local meeting is the locus of authority

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291 To give some perspective to these numbers, the membership of BYM in 2001 was 16,468 persons. Source: Friends World Committee for Consultation.

for Friends. It is possible that this structure promotes more local than international concern.

Britain Yearly Meeting’s 1999 edition of Quaker Faith and Practice also tells the story of the Scott Bader Commonwealth to illustrate its testimony of social responsibility in the realm of work and economic affairs. Scott Bader is a synthetic resin and polymer manufacturing company in Wollaston, Northamptonshire that began experimenting with a democratic form of organization in the 1940s. In 1951, the founder, Ernest Bader, and his co-founders gave 90% of their privately owned shares to the Scott Bader Commonwealth, inviting employees to become members. In 1963, the co-founders gave the remaining 10% of their privately owned shares to the Commonwealth. The following is an excerpt from the Scott Bader Corporate constitution (1963):

Power should come from within the person and the community, and be made responsible to those it affects. The ultimate criteria in the organization of work should be human dignity and service to others instead of solely economic performance. We feel mutual responsibility must permeate the whole community of work and must be upheld by democratic participation and the principle of trusteeship.

Common-ownership of our means of production, and a voice in the distribution of earned surplus and the allocation of new capital, has helped in our struggle towards achieving these aims.

The Commonwealth has responsibilities to the wide national and international community and is endeavoring to fulfil them by fostering a movement towards a new peaceful industrial and social order. To be a genuine alternative to welfare capitalism and state-controlled communism, such an order must be non-violent in the sense of promoting love and justice, for where love stops, power begins and intimidation and violence follow. One of the main requirements of a peaceful social order is, we are convinced, an organization of work based on the principles outlined here, a sharing of the fruits of our labours with those less fortunate instead of working only for our own private security, and a refusal to support destructive social conflict or to take part in preparations for war.293

293 Ibid.,23.57.
Additionally, Article 5(H) of the Scott Bader constitution states that “the highest paid salary in the company shall not be excessive when compared with the lowest basic pay for a Commonwealth member.”

Prior to 1989, the ratio of the highest paid to the lowest paid employee was set at 7:1. In fact, at the time the constitution was written, 7:1 was understood as an extreme; in 1961 the actual ratio was roughly 3 ½: 1. In 1989, when the company had to hire a manager from outside the Bader family, it found that it had to bring the manager’s salary “into line with market conditions,” which meant exceeding the 7:1 ratio. The company considered raising the pay of those at the bottom in order to maintain the 7:1 ratio but found that this was not financially feasible. Most members of the company accepted that the change was necessary. Most also agreed that the “airy phrase that the directors should not be paid excessively when compared with the lowest paid employees” and the democratic nature of the company are sufficient to keep the gap between highest and lowest paid employees reasonable.

These excerpts from the Scott Bader constitution describe Quaker attempts to transform corporate structures for the purposes of sharing economic power, reducing economic inequality, and promoting a peaceful social order. The practices of common ownership, shared decision-making, and limiting the gap between the highest and lowest


295 “When the Company Shares,” 24.

296 Ibid.

297 Ibid.

298 Ibid., 24-5.

299 Ibid., 24.
paid employees support an ethic of relative economic equality. The concern to minimize social conflict and the belief that social change can and should occur peacefully echoes the social theory that is implicit in the broader Quaker tradition. Additionally, the claim that human dignity and service to others ought to be the ultimate criteria for organizing work is radical and strikingly similar to Roman Catholic claims.

The first and second narratives illustrate philanthropy as a means of rectifying economic inequalities, which is consistent with earlier Quaker texts. Douglas Smith gave away his personal fortune. He hoped his action would inspire others to act similarly. The 1% Fund represents a more corporate effort in which Friends called upon Friends to sacrifice some of their personal wealth in order to make more equal distribution of goods and services within and between nations. Through this action Friends hoped (but failed) to demonstrate to the British government that British citizens would support global redistribution via taxation, a more coercive means of redistribution. The organization of the Scott Bader Commonwealth is an example of institutional reform, which seems more promising as a means of addressing economic inequality because it also addresses the issue of economic power. That is, philanthropy relies on the good will of those with economic means and power to give some of their wealth away, leaving those at the bottom powerless and dependent upon those at the top, which reinforces inequality. Institutional reforms, such as those implemented at Scott Bader, share both wealth and power, which work toward equality.

In conclusion the most important developments in the late twentieth century for a Quaker theology of equality and a Quaker ethic of relative economic equality are (1) more explicit attention to and explication of the testimony of equality; (2) connection of
the testimony of equality to social justice, particularly the connection of economic inequality to structural injustice; (3) use of the peace testimony to criticize economic violence; and (4) the application of Quaker decision-making processes to the firm as a means of sharing economic power.

3.6 Conclusion

In conclusion, the late nineteenth century was a time of introspection for the Philadelphia Yearly Meeting. Therefore, little attention was paid by PYM to social problems like poverty and economic inequality. In the twentieth century, PYM began to turn its attention toward social issues, but the structural division of the Meeting into two branches, Hicksite and Orthodox, and the desire for unification of the Meeting, meant that much of PYM’s attention and energy was focused on repairing this rift. It was only after reunification of PYM in 1955 that the Meeting could turn its attention more fully to social issues, like economic inequality.

LYM had a different trajectory. Because LYM did not suffer schism in the nineteenth century, it was in a better position of think about issues and problems outside of its own Society. Thus LYM identified poverty as a social problem in 1883. LYM’s identification of social problems continued into the mid twentieth century. Because of its growing desire to be inclusive and non-prescriptive from the mid twentieth century forward, however, LYM has failed to systematically and coherently analyze social problems, including economic inequality, in the second half of the twentieth century. That is, because LYM (now British Yearly Meeting or BYM) is committed to having its book of faith and practice serve as an “encouragement of self-questioning, of hearing
each other in humility and love, it has forgone a systematic sustained critique of economic inequality and other social problems. Nonetheless, through the narratives in its 1999 *Quaker Faith and Practice* BYM indicated that it is concerned about the problem of economic inequality. The greatest contribution of the Quaker tradition, as represented by Philadelphia Yearly Meeting and British Yearly Meeting, to a Quaker theology of equality and a Quaker ethic of relative economic equality is its testimonies of equality, peace, simplicity and stewardship, its spirituality of work and its decision-making process.

In the next chapter I will attend to the evasion of the problem of economic inequality by both the Catholic and Quaker traditions. That is, while both traditions worry about poverty, economic well-being, and economic justice, neither tradition has developed or maintained a sustained critique against economic inequality per se. Why is this?

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CHAPTER FOUR
THE EVASION OF ECONOMIC INEQUALITY

4.1 Introduction to the Chapter

On the surface, it would appear that the Roman Catholic and Quaker traditions have little in common. The Roman Catholic Church is the largest Christian group in the world with roughly one billion adherents. Quakers number only three hundred thousand worldwide. The difference in the size of the two groups is similar in the US, where Roman Catholics number seventy-two million and Quakers number one hundred thousand. The Roman Catholic Church has an elaborate hierarchy, with the Bishop of Rome situated at the top, followed by archbishops, bishops, priests, and laity. Teaching authority rests with the bishops and pope. Doctrinal and liturgical authority also rests with bishops and pope. Thus, prescriptions for belief and practice come from the top down. Quakers do not have an ordained ministry, nor do they have a central teaching, doctrinal, or liturgical authority. Local meetings are organized into regional and yearly meetings, but authority remains with members and their delegates. Hierarchy and complexity, or the lack of these, are also evidenced in Catholic and Quaker worship practices. Catholic churches are often physically large and ornate. A single Catholic parish might have a thousand or more parishioners. Catholic mass is led by a priest and

302 Ibid.
303 Ibid.
is rich in symbolism and ritual. Quaker meeting houses are plain, usually with wooden benches facing each other and no decoration. A single Quaker Meeting would likely have no more than a couple hundred members. Quaker worship begins in silence and the silence is only broken if a member is moved by the Spirit to speak.

It seems all the more significant, then, that these two very different traditions share in common an evasion of the problem of economic inequality, especially inequalities of income and wealth. From the late nineteenth century to the present, neither has made a sustained critique of inequalities of income and wealth, even as these grew in the late twentieth century. This is all the more surprising because both the Roman Catholic and the Quaker traditions are committed to the spiritual equality of persons and both worry about the gap between rich and poor within and between nations. Because churches provide moral leadership and act as agents of social change, the failure of churches generally (and these two traditions particularly) to criticize economic inequality as morally problematic hinders society’s ability to address this problem.

4.2 The Roman Catholic Evasion of the Problem of Economic Inequality

For the Roman Catholic tradition, the reasons for the evasion of a critique of inequalities of wealth and income are fourfold. First, from the late nineteenth to the early twentieth century, understandings of salvation history led to a de-emphasis on equality in this life because the tradition held that equality would be realized in the next life. In fact, inequality was considered a moral good because it created opportunities for moral action on the part of both rich and poor. Second, in the Roman Catholic tradition, meeting basic needs has taken precedence over equality. Third, in the Catholic tradition, social harmony takes precedence over equality. Fourth, and most importantly at the beginning
of the twenty-first century, the Catholic tradition under the leadership of John Paul II has prioritized freedom over equality.

As discussed in chapter two, Leo XIII justified economic inequalities as necessary, irrelevant, and efficacious. He thought that human beings “differ[ed] in capability, in diligence, in health, and in strength” (RN 14). These differences were necessary because social life required “various kinds of capacity” (RN 14) and these differences led to different outcomes in terms of income and wealth. Leo XIII thought inequalities of income and wealth were irrelevant because the things of this earth are transient and human beings are created for “things heavenly and everlasting” (RN 18). Thus, it did not matter how much or how little one had in this life, except as income and wealth (or the lack of them) were opportunities for virtue and merit. That is, Leo XIII thought inequalities were efficacious because they were “motives of virtue and occasions for merit” (RN 18) – i.e., the poor could be virtuous by humbly accepting their plight and the rich could act meritoriously by giving to the poor from their surplus. While Catholic social teaching has developed since Leo XIII and no longer justifies inequality on the basis that it is an opportunity for moral good, it is important to remember this history lest the tradition falls back into this kind of rationalization for inequality.

The Roman Catholic tradition, as exemplified in the modern social teachings, has long been concerned with meeting basic human needs. The extreme poverty and deprivation of the masses in the late nineteenth century were what prompted Leo XIII to write *Rerum Novarum*. From John XXIII forward, Catholic social teaching has prescribed a framework of human rights to govern social and economic development. Some of the human rights prescribed by CST – like the right to worship freely according
to one’s conscience and the right to choose freely one’s state of life – are aimed at protecting the liberties necessary for the realization of human dignity. These rights cannot, according to CST, be violated in the pursuit of other valuable ends such as security or material well-being. Other human rights prescribed by CST – like the rights to food, clothing, and shelter – are aimed at ensuring that basic material needs are met. While the Catholic human rights framework identifies basic material goods that are necessary for the realization of human dignity, it does not recognize the relative nature of these goods. That is, the Catholic human rights framework does not necessarily understand the amount of food, clothing and shelter necessary for achieving human dignity as both objective (as in the number of calories needed to sustain life) and relative, that is, related to the quantities of these goods that others have. For example, in defining a living wage, *Pacem in Terris* noted that workers have a right to a wage that gives “the worker and his family a standard of living in keeping with the dignity of the human person” (20). John Paul II also stresses the right to a living wage in *Laborem Exercens*. He notes that “the justice of a socioeconomic system . . . [should] be evaluated by the way each man’s work is properly remunerated in the system” (19b). He defined just remuneration, or the right to a living wage, in terms of a family wage, “a single salary given to the head of the family for his work, sufficient to the needs of the family without the spouse having to take up gainful employment outside the home” (19c). Neither *Pacem in Terris* nor *Laborem Exercens* specifies how “a standard of living” or “the needs of the family” are to be determined. Thus CST leaves the door open to interpreting needs and standards objectively and in relation to others, but it does not explicitly require this interpretation.
So on the one hand, I want to affirm CST’s human rights framework because it identifies the goods that should be distributed and it describes a set of conditions that many people would agree are necessary for the enjoyment of basic goods, such as freedom of religion, the right of assembly and association, and “the right to take an active part in public affairs” (PT 14, 23, 26). On the other, I want to suggest that particularly in terms of the economic rights it prescribes, CST’s human rights framework is insufficient without a conception of relative equality.

The Roman Catholic tradition has valued social harmony. This has led it to take a conservative approach to social change. Because the tradition has valued social harmony, it has been slow to criticize existing socio-economic hierarchies, especially at the end of the nineteenth and beginning of the twentieth centuries, for fear of social upheaval. This position became less tenable in the mid-twentieth century, because more and less radical movements for social change abounded, such as the movements for racial and gender equality in the US and the movements for independence from colonial rule by African nations. Yet in 1963 John XXIII still called for gradual social change: “It must be born in mind that to proceed gradually is the law of life in all its expressions; therefore, in human institutions too, it is not possible to renovate for the better except by working from within them gradually” (PT 162). On the one hand, I do not want to be dismissive of the idea of peaceful social change; change that is carried out via persuasion because peaceful, non-coercive approaches to social change demonstrate respect for human beings. On the other hand, the effect of too much patience with unjust systems, structures, and individuals, is the prolonging of injustice, which is ultimately inconsistent with the Catholic tradition’s commitments to justice.
At the end of the twentieth century, the Catholic tradition evades the problem of inequalities of income and wealth by shifting attention to the issue of freedom. John Paul II would not consider the shift in focus to the need for freedom as an evasion of the problem of economic inequality. Rather, John Paul II implied that freedom is the means to alleviate inequalities of basic goods. For example, John Paul II supported religious freedom and the freedom of labor unions to organize and agitate for more humane conditions for workers (SRS 15.5). For John Paul II, labor unions were a means of securing a minimal standard of living that would meet basic needs, and if basic needs are met, John Paul II seemed to believe that the meaningful gap between rich and poor would be reduced. For example in *Sollicitudo Rei Socialis* he noted: “One of the greatest injustices in the contemporary world consists precisely in this: that the ones who possess much are relatively few and those who possess nothing are many. It is the injustice of the poor distribution of the goods and services originally intended for all” (SRS 28.5). He went on to say: “The evil does not consist in ‘having’ as such, but in possessing without regard for the quality and the ordered hierarchy of the goods one has. Quality and hierarchy arise from the subordination of goods and their availability to man’s ‘being’ and his true vocation” (SRS 28g). The implication is that human beings have a right to the “goods essential for them to ‘be’” (28.8), and one cannot keep more than enough to “be” while others lack the material goods necessary to being. At the same time, once everyone has what is necessary for being, distribution does not matter.

It is also the case that John Paul II likely avoided arguments about economic equality because of his aversion to socialism. That is, he strongly (and it seems to me irrationally) believed any form of socialist organization would necessarily devolve into
totalitarianism. John Paul II’s concern about the necessary devolution of socialism into totalitarianism is evidenced in the Congregation for the Doctrine of the Faith’s first instruction on liberation theology. While not authored by John Paul II, the first (and second) instructions on liberation theology were issued during his pontificate and as such are indicative of his own thinking. The first instruction cites Paul VI’s “warning” against Marxism: “it would be illusory and dangerous . . . to accept elements of Marxist analysis without recognizing its connections with the ideology, or to enter into the practice of class struggle and of its Marxist interpretation while failing to see the kind of totalitarian society to which this process slowly leads.”

While John Paul II supported equality of basic goods, the evasion of inequality, however, is in the fact that inequality, particularly inequalities of income and wealth after the basic needs of all are met, are not criticized. Further, in order to sufficiently address the gap between rich and poor, basic needs must be understood as relative, and a relative definition of basic needs is not a part of John Paul II’s conception of distributive economic justice. Furthermore, as the case of the US shows, freedom, in the way John Paul II understands it as freedom for truth, which includes religious freedom, freedom to organize, and freedom of economic initiative, does not necessarily encourage relative economic equality or even equality of basic goods. For example, freedom to organize is guaranteed in the US, but labor unions have been losing strength over the last twenty-five years. That is, between 1979 and 2003, the percentage of workers belonging to unions

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decreased from twenty four percent to thirteen percent. Thus, the formal freedom to organize does not mean that labor unions will be effective in recruiting members or agitating for better pay and a more equal distribution of profits.

Similarly, while an implicit objective of John Paul II’s advocacy of freedom of economic initiative may be to lessen economic inequality, inequalities of income and wealth are growing in the US, a country that protects the freedom of or right to economic initiative. For example, comparing the period 1980-82 to the period 2001-03, the ratio of the after-tax incomes of the top twenty percent of families to the bottom twenty percent of families increased from 5.5:1 to 7.3:1. That is, in the period from 1980-82, the families in the top twenty percent of the income distribution earned 5.5 times the income of those in the lowest twenty percent after taxes; in the period from 2001-03, the income of the top twenty percent was 7.3 times that of the lowest twenty percent. The growth in the gap between the top five percent and the bottom twenty percent is even more pronounced. From 1980-82, the top five percent earned 7.7 times that of the bottom twenty percent; from 2001-03, the top five percent earned 12 times the bottom twenty percent.

All this is to say that securing freedom does not necessarily lead to relative economic equality. To be achieved, relative economic equality needs to be a distinct goal, and relative economic equality should be a distinct goal in the Roman Catholic tradition because it is necessary for the realization of human dignity and solidarity.

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306 Ibid., 20.

307 Ibid., 21.
4.3 The Quaker Evasion of the Problem of Economic Inequality

In the Quaker tradition, the reasons for the evasion of a critique of inequalities of wealth and income are also fourfold. First, the focus of Philadelphia Yearly Meeting on internal matters in the nineteenth and early twentieth centuries meant that it did not have the resources in terms of time and energy to address social problems, including economic inequality. Second, the Quaker tradition has not considered equality of income or wealth to be important for realizing spiritual equality or performing religious duties. Third, the Quaker tradition has valued harmony within the Religious Society of Friends over economic equality. Fourth, the slow pace of Quaker decision-making has delayed a Quaker critique of inequalities of wealth and income.

As discussed in chapter three, Philadelphia Yearly Meeting split into two groups, which came to be known as the Orthodox and the Hicksites, in 1827. The split was in part a result of an inward turn prompted by the deaths of prominent founders of the Quaker tradition at the end of the seventeenth century. The inward turn led to factionalism, which in turn led to a formal split in 1827. For the remainder of the nineteenth century, the two branches of Philadelphia Yearly Meeting were focused on internal doctrinal issues, such as the relationship between the Inner Light, doctrinal statements, and the Bible as sources of religious authority, and further schisms such as the break between the Gurneyites and Wilburites with the Orthodox branch of PYM in 1860, leaving little time for wider social engagement and criticism.

A second reason the Quaker tradition has not criticized economic inequality is that the tradition does not understand economic inequality to be a hindrance to spiritual equality or to performing one’s religious duties. The key religious experience and

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308 Hamm, *Quakers in America*, 43-54.
responsibility for Friends is to be open to receiving and communicating messages from the Spirit to the Meeting community. To date, the Religious Society of Friends has not understood economic inequality as an impediment to anyone’s – whether rich, poor or middle class – ability to receive messages from the Spirit. Nor have Friends understood economic inequality between members of the Society to hamper anyone’s ability – whether rich, poor, or middle class – to communicate an inspired message to the Meeting community. In this regard, Friends have treated economic inequality differently from gender and racial equality. That is, men and women had to be considered as equals because both have the potential be recipients and communicators of Divinely inspired messages. Similarly, those of different skin tones had to be considered equal because everyone – regardless of skin color – could be in direct communion with the Spirit and individuals had to be free to communicate Divinely inspired messages to the Meeting community. But Friends have not understood that everyone needs to have the same, even relatively the same, amount of income or wealth to receive and communicate messages from the Spirit. On the one hand, this makes sense; it is analogous to the idea that in a democracy income and wealth are disconnected from voting rights. Practically, however, it raises the question of whether income and wealth correlate positively, negatively, or neutrally to “weightiness” within the Meeting community. To my knowledge, no such studies have been conducted. Yet, Michael Sheeran, in his book about Quaker decision-making process, raises the question, “Are all participants truly equal or only nominally so?”309 Sheeran, in my reading, never answers this question. Further, my own experience of attending a Quaker meeting for three years indicated that “weighty”

Friends were often persons with much education and correlative levels of income and wealth (for example Ph.D.’s in various fields and medical doctors). In making this observation I want to be clear that there may have been other reasons for wealthy Friends weightiness in the Meeting I attended – their status as birthright Friends and their tenure in the Meeting for example – but, nonetheless, it is hard to tease out exactly why some Friends have more influence than others in a Quaker meeting.

A third reason that the Religious Society of Friends has not criticized economic inequality is that the Quaker tradition has valued harmony and unity in the Meeting community over economic equality. That is, an early concern of the Religious Society of Friends was Church reform, particularly the abolition of tithes and other Church dues in seventeenth century England. These concerns cut across class lines, and membership in the Society of Friends reflected this diversity. As such, criticism of economic inequality was avoided. Instead, emphasis was placed on the attitudes members held toward income and wealth. That is, it was not a problem to be wealthy or poor, any problem was rooted in one’s attachment to the things of this world, which were and are understood as transient. The Quaker spiritualization of equality is very similar to Leo XIII’s view that material wealth and poverty only mattered in that they were occasions for virtue on the part of the rich and the poor. That is, the Quaker tradition has understood that the rich could be virtuous by practicing philanthropy and the poor could be virtuous by practicing humility and neither should demonstrate attachment to the things of this world by caring too much about material possessions because material goods are transient. This is similar to Leo XIII’s moral evaluation of material inequality: “Money and other things which men call good and desirable we may have them in abundance or we may want them
altogether; as far as eternal happiness is concerned it does not matter; the only thing that is important is to use them aright” (RN 18).

The Quaker tradition’s emphasis on unity within the Meeting community continued into the twentieth century. In the US, an emphasis on harmony of beliefs, ideas and practices was important for the reunification of Philadelphia Yearly Meeting in 1955. In Britain, the emphasis from the mid twentieth century forward has been on unity in diversity as evidenced by the unsystematic compendium of excerpts that is Britain Yearly Meeting’s *Quaker Faith and Practice*.

Fourth, the slow pace of Quaker decision-making has delayed Quaker criticism of economic inequality. In the Quaker tradition, the entire Meeting community must be unified around any pronouncements of faith and practice. It took nearly one hundred years for Quakers in the United States to become unified around a condemnation of slavery, and still longer for unity on the condemnation of human bondage to be developed into a full-fledged commitment to racial equality. The evolution of Philadelphia Yearly Meeting’s stance on slavery is a good illustration of Quaker process, which is slow and deliberate and requires unity. This illustration sheds light on why, even as the Quaker tradition begins to recognize the problem of economic inequality, it may take one hundred years or more for the tradition to make any kind of pronouncement against it.

The Germantown meeting (a monthly meeting affiliated with PYM) authored the first anti-slavery appeal in the American colonies in 1688. But because Friends were not in unity regarding opposition to slavery, PYM did not act on this petition. In 1696, PYM
issued its first caution against importing slaves.”

Still, PYM said nothing about slave ownership because some Friends still owned slaves, and as a group Friends were not unified in opposing slavery. In 1711, the Chester Monthly Meeting (another monthly meeting affiliated with PYM) petitioned PYM to prohibit Friends from buying slaves imported into Pennsylvania. In response, PYM asked London Yearly Meeting to consult with American meetings “to decide whether or not Quakers should import and own black slaves.” By 1715, LYM advised against the slave trade, but not against slave ownership or the institution of slavery per se. By 1719, PYM prohibited “the importation of blacks and the buying or selling of Indian slaves,” but like LYM it did not condemn or prohibit owning slaves. It was not until 1754 that PYM cautioned against slaveholding. At this time, PYM rewrote its queries to local meetings, including its query on slavery. The 1755 query on slavery read, “Are Friends clear of importing and buying Negroes and do they use those well which they are possessed of by Inheritance or otherwise endeavoring to train them up in the Principles of the Christian Religion?” Queries were one way in which the Yearly Meeting could promote discussion of Friends’ concerns about slavery without forcing a decision. That is, queries could be used to bring about unity through reflection and discussion. Thus, the query on slavery was not a top-

\[\text{310} \quad \text{Soderlund, } Quakers and Slavery, 19.\]
\[\text{311} \quad \text{Ibid., 20.}\]
\[\text{312} \quad \text{Ibid.}\]
\[\text{313} \quad \text{Ibid., 21.}\]
\[\text{314} \quad \text{Ibid., 27.}\]
\[\text{315} \quad \text{PYM minutes of September 23-29, 1758 quoted in Soderlund, } Quakers and Slavery, 27.\]
down decision supporting abolition but rather a means to “threshing” concerns about slavery.

In 1758, PYM took a further step toward abolition by appointing a committee of five respected ministers, John Woolman, John Sykes, John Scarborough, John Churchman, and Daniel Stanton, “to visit and treat with all such Friends who have any Slaves.” These patient, non-threatening visits were key to achieving unity regarding slavery. An example from the experience of a Virginia Quaker in the early 1780s illustrates the power of this process:

Clark Moorman . . . owned two slaves whom he refused to free for over a year, despite frequent visits by members from his monthly meeting. When the Friends were close to giving up on him, but agreed to pay him one last visit, he refused to come out of the field to meet them. The committee waited until he did come home for dinner, when they “met him pleasantly and enquired after his health etc. After dinner was over (committee member) Caleb Jones observed, ‘Well Clark, we have come to pay thee a little visit, and wish to have a private opportunity with thee if thou hast no objection,’ he replied he had none so they all sat down together, as he said with his mind braced against anything they might offer. They sat in silence about an hour when Caleb Jones observed ‘Well Friends I reckon we had as well ride,’ they said Farewell without saying one word on the subject of their visit, to his surprise and mortification.” Moorman was troubled by the visit, and soon after he had a dream in which a black boy controlled the gate to heaven and refused to let Moorman enter. The slave owner took that as a sign, and manumitted his slaves the next day.  

\[316\] Soderlund, *Quakers and Slavery*, 31

\[317\] According to Soderlund, Moorman’s “conversion” is described in a letter from his grandson Thomas H. Tyrell [Terrell] to Benjamin Seebohm dated the twenty-fifth day of the twelfth month 1848. See Soderlund, *Quakers and Slavery*, 105.
In 1774 PYM changed its discipline to disown slave buyers and sellers, and by 1776 PYM changed its discipline to disown all slaveholders who “after much advice and time has been spent with them, still refuse to manumit their slaves.”\textsuperscript{318} As Howard Brinton notes, “Had a vote been taken as early as 1700 slavery would probably have been voted out, but a substantial minority would not have concurred. The subject was brought up again and again, progress was made slowly until in 1776 the Society was united in refusing membership to persons who held slaves.”\textsuperscript{319}

In sum, Quaker decision-making is a slow process. Yet once Quakers unite on a proposition, their commitment is firm and steadfast. Friends, to my knowledge, never looked back once they arrived at their position condemning slavery.

4.4 What is wrong with what these two traditions are thinking and doing or not thinking and not doing?

The most obvious parallel between the two traditions is their concern for harmony. Interestingly, in the Quaker tradition the focus on harmony is internal while in the Roman Catholic tradition the concern for harmony is external. That is, the Quaker tradition worries about harmony within the meeting community, while the Roman Catholic community worries about social and political accord. Nonetheless, the concern of both groups for harmony has had the effect in both traditions of producing an emphasis on gradual social change. Initially, this seemed troubling because those suffering from injustice cannot wait one hundred years for change. Yet the way in which the Quaker tradition came to condemn slavery without violence and the steadfastness of the


tradition’s commitment to abolition and ultimately to racial equality is a compelling example of how gradual social change can be effective in terms of the permanence of the change.

A second parallel is the disconnection in both traditions of relative economic equality from spiritual well-being. In the Quaker tradition, a person’s economic status is unconnected to his or her ability to receive and communicate messages from the Spirit within the Meeting community. On the one hand, this is radically egalitarian. There is no class of persons – ordained, educated, wealthy, or otherwise – who have a corner on the market of spiritual authority. On the other hand, it would be interesting to know whether and how this radically egalitarian philosophy is actualized in Meeting communities. That is, are Meeting communities socio-economically diverse? And, if so, is there any connection between socio-economic status and status, or “weightiness,” within the Meeting community?

In the Catholic tradition, the separation of spiritual well-being and economic well-being (prominent in the work of Leo XIII and to a lesser extent Pius XI) faded in the mid twentieth century, but has appeared again with John Paul II’s emphasis on freedom. That is, for Leo XIII and Pius XI, economic inequality had spiritual and moral benefits in the sense that because of economic disparities, the poor had the opportunity to practice the virtue of humility and the rich had the opportunity to practice the virtue of generosity. In the mid twentieth century, John XXIII, the Second Vatican Council, and Paul VI, all placed more emphasis on the relationship between equality, including relative economic equality, and the realization of one’s human dignity. John Paul II, however, emphasized the necessity of religious freedom and other freedoms, such as the freedom for spiritual
well-being and the freedom for economic initiative, more so than the relationship between economic equality, in the sense of economic outcomes, and spiritual well-being. While John Paul II may assume that freedom leads to economic well-being, even to relative economic equality, this is not necessarily the case. More study is needed on the relationship between freedom and equality in John Paul II’s thought.

4.5 Conclusion

While the priority of harmony over equality and the separation of spiritual well-being from material well-being have hindered Roman Catholic and Quaker analyses of economic inequality as a moral problem, there are also conceptual resources within both religious traditions that could aid in the development of theologies of equality and ethics of relative economic equality. An exploration of the potential for a Quaker theology of equality, a Quaker ethic of relative economic equality, a Roman Catholic theology of equality, and a Roman Catholic ethic of relative economic equality as well as common ground between the two traditions regarding a theology of equality and an ethic of relative economic equality is the subject of chapter five.
CHAPTER FIVE
TOWARD A THEOLOGY OF EQUALITY
AND AN ETHIC OF RELATIVE ECONOMIC EQUALITY

5.1 Toward a Quaker Theology of Equality

The foundation for an ethic of relative economic equality is a theology of equality. The articulation of a theology of equality in the Quaker tradition seems a logical extension of the tradition’s foundational testimony of equality. A theology of equality in the Roman Catholic tradition initially seems counter-intuitive in light of its hierarchical structure, evidenced by the top-down formulation of many of the CST documents analyzed in chapter two, and the inequality between women and men and between ordained and laity within the tradition. Yet the egalitarian theological anthropology articulated in CST in the Vatican II period is a basis for a Roman Catholic theology of equality.

The Quaker testimony of equality is rooted in the belief that “there is that of God in every person.” Implicit in this statement is a doctrine of God and of human nature. In the Quaker tradition, God is understood to be “infused Spirit rather than abstract external being.” That is, the Quaker tradition emphasizes the immanence of God and human experience of God. For Friends, the reality of God is known through the

320 PYM (1999), Faith and Practice, 75
321 Wilmer A. Cooper, A Living Faith: An Historical and Comparative Study of Quaker Beliefs (Richmond, Indiana: Friends United Press, 1990), 34.
Importantly, in the Quaker tradition all human beings have the potential for the experience of God – human beings are equal in this potential. Difference arises in the extent to which human beings pay attention to and cultivate their experience of God. Differences in attention to and cultivation of a relationship with God should not, however, be understood as justification for socio-economic inequality because human beings have equal worth in the eyes of God regardless of their response to God and because equal respect for human beings is required no matter the level of their spiritual development. A potential point of development in the Quaker testimony of equality that would contribute to a Quaker theology of equality (or vice versa) is the question of whether relative economic equality is necessary for spiritual equality. Stated differently, does economic inequality impede spiritual equality? While economic inequality does not impede spiritual equality in the sense of being equal in the eyes of God, it may well impede the realization of spiritual equality in this world. That is, as economic inequality impinges upon the realization and actualization of human dignity in the material world, it is a hindrance to the realization and actualization of spiritual equality.

The Quaker tradition understands human beings to be created in the image and likeness of God. In the Quaker tradition, the belief that human beings are created in the image of God is understood to mean that human beings have “the God given potential or capacity to respond to God’s grace and transforming love.” Like the potential to experience God, the potential to respond to God is a characteristic of all human beings.

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322 Cooper, A Living Faith, 34.

323 Ibid., 69.
That is, human beings are equal in their potential or capacity to respond to God. Again, human beings may differ in the extent to which or ways in which they respond to God, but differences in response to God (even absence of response to God) should not be understood as justification for socio-economic difference. Here again, socio-economic inequalities may impede persons’ abilities to respond to God. That is, having too much or too little in the way of economic resources may limit a person’s capacity to respond to God because material pursuits constrain one’s time and attention. It strikes me that while intuitively it seems that the poor may be constrained by the time and attention it takes simply to gain the material goods needed for survival, they are more likely to actualize a response to God in the form of prayer and other forms of worship, whereas the rich are more likely to be consumed by their work and hence not have or take the time to respond to God. Thus in some ways what it requires to be rich (a single-minded devotion to one’s work) and the temptation of idolatry of wealth and status are as dangerous to spiritual equality as the impediments to the realization and actualization of the human dignity of the poor in this world. If this assessment is correct, narrowing the gap between rich and poor could positively impact the realization of spiritual equality of both rich and poor because greater economic equality would mean that the rich would be less rich in relative terms and thus the conditions for idolatry of wealth and status would be lessened if not eliminated and the poor would have the material resources and the positional conditions necessary for better realization and actualization of their human dignity.

From the belief that there is that of God in every person, the Quaker tradition deduces that human beings are equal before God. Equality before God in the Quaker

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tradition means that human beings are equally valued by God. Because the Quaker tradition understands God to value all human beings equally, the Quaker tradition holds that all human beings are due equal respect. Historically, the Quaker tradition has interpreted equal respect to require practices of social equality such as refusing to doff hats to social superiors, equal opportunity for ministry for men and women within the tradition, and repudiation of the practice of slavery. In contemporary society, equal respect requires relative equality of income and wealth because money is the means for accessing the goods that human beings have reason to value such as food, shelter, clothing, education, and health care. Further, as Hicks rightly notes human beings’ identities are mediated through material goods (like food, shelter, clothing, etc.) and in this sense “material goods are social goods and they carry various socially meanings,” including meanings in the moral and spiritual dimensions of life. Thus, the moral norm of equal respect cannot be addressed simply by meeting an objective set of basic needs because the amounts and quality of food, shelter, clothing, education, and health care indicate human beings’ social positions and the moral norm of equal respect, in the Quaker tradition, indicates that social hierarchies ought to be abolished.

From the belief that human beings are equal before God, the Quaker tradition draws the conclusion that human beings are entitled to independence and to control of

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325 Cooper, *A Living Faith*, 39;139.


their own lives.\textsuperscript{328} In contemporary society, money is the chief means to independence and control over one’s own life. Vast disparities of income and wealth leave the poor dependent upon the largess of the rich. Thus, a theology of equality that values independence and a certain amount of control over one’s own life, requires relative equality of income and wealth because income and wealth are the means to independence from reliance on the largesse of the wealthy and the state and to control over one’s own life, in terms of being able to provide for one’s own basic needs such as food, housing, and health care, in contemporary society. Further, even after basic needs are met, relative economic equality is necessary for independence and control over one’s own life because of the social, political, and economic power that accrues to the rich in societies (like the US) where there are vast disparities between the wealth and income of rich and poor.

5.2 Toward a Catholic Theology of Equality

Contemporary Catholic analysis of economic problems is often done using the frameworks of human rights and/or the common good.\textsuperscript{329} It is my claim that a theology of human equality is prior to either a human rights or a common good framework. Unless the Catholic tradition highlights and emphasizes the equality of human beings, the ideas that human beings have fundamental human rights or that human beings ought to orient their social, political, and economic lives toward the common good fall flat. It may be the case that in such frameworks human equality is assumed, but explicitly articulating

\textsuperscript{328} Philadelphia Yearly Meeting, \textit{Faith and Practice} (1997), 75.

\textsuperscript{329} See, for example, David Hollenbach, \textit{Claims in Conflict: Retrieving and Renewing the Catholic Human Rights Tradition} (New York: Paulist Press, 1979) and \textit{The Common Good and Christian Ethics} (New York: Cambridge University Press, 2002).
a theology of equality makes claims about human rights and the common good more compelling.

The Catholic tradition understands human beings to be equal in their nature and origin; redemption; and divine calling and destiny (GS 29). The Catholic tradition deduces from its belief that human beings are fundamentally equal the principle that human beings have equal dignity, in spite of differences in physical power and in intellectual and moral resources (GS 29). And because human beings have equal dignity, all human beings have certain fundamental rights, such as the right to life and a worthy standard of living (PT 11). While the Catholic tradition acknowledges differences of physical power as well as intellectual and moral resources, the Second Vatican Council moved away from Leo XIII’s claim that such differences justify “unequal fortune” (RN 14). The Second Vatican Council argued that equal dignity requires the mitigation of “excessive economic and social differences between the one human family” (GS 29). Again, a theology of equality motivates commitments to human rights and orients claims about the content of the common good. For example, in *The Common Good and Christian Ethics*, David Hollenbach describes the poverty and social isolation of the inner city poor. He goes on to argue, “what the urban poor need if they are to escape isolation . . . is a transformed institutional framework that supports a more equal and

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330 See John XXIII, *Pacem in Terris* 8-38 for a discussion of the robust set of rights due human beings because of their nature and dignity.

reciprocal relationship with the larger society. . . The partners in such a relationship regard each other as *equals.*” 332 While I agree with Hollenbach that mutually reciprocal relationships are necessary to achieve greater distributive justice (i.e., to alleviate inequalities of income and wealth), I also think that in order to get to a place where people in the US value mutual reciprocity in social and economic relationships, a more robust conception of equality and its requirements is needed. A theology of equality is one example of a more robust conception and explanation of equality and its requirements.

5.3 Toward a Catholic Ethic of Relative Economic Equality

While the Roman Catholic and Quaker traditions have evaded the problem of inequalities of income and wealth, there are elements in both traditions that could inform an ethic of relative economic equality, understood as relative equality of income and wealth, which is important because income and wealth provide access to the goods human beings have reason to value, goods that help them actualize their human dignity, like food, clothing, shelter, health, political participation, and education. Relative equality of income and wealth would also facilitate human solidarity, a moral goal important in both traditions.

In the Roman Catholic tradition, the most important resources for an ethic of relative economic equality are: (1) an egalitarian theological anthropology; (2) the principles of universal destination of goods and right use of property; (3) the virtue of solidarity and the value of participation; (4) the recognition that economic inequality can be a threat to peace; and (5) a theology of work. These conceptual resources are

multivalent and have been interpreted differently at different times in Catholic social teaching. Indeed, as discussed in chapters two and four the concepts of universal destination of goods and right use have been interpreted to support economic inequality. What I hope to show here is how, starting from a theology of equality, these concepts can be employed to support an ethic of relative economic equality.

The foundation for a theology of equality in the Roman Catholic tradition is best articulated in Gaudium et Spes: “Since all men possess a rational soul and are created in God’s likeness, since they all have the same nature and origin, have been redeemed by Christ, and enjoy the same divine calling and destiny, the basic equality of all must receive increasingly greater recognition” (29.1). This seemingly simple, benign paragraph indicates how and why the Roman Catholic tradition conceives of human beings as equal. Human beings are equal in creation, redemption, reason, nature, and destiny.

Once the ideal of equality is brought to the forefront of Roman Catholic theology and ethics, we can begin to think about what constitutes equality in the economic sphere and what tools the Roman Catholic tradition provides for working towards relative economic equality, generally defined as “a situation in which inequalities are held within a defined range set by moral limits.”333 Because income and wealth give human beings access to the goods they have reason to value, I have argued that the economic goods in need of equalization are money and other forms of property that are easily converted into money.

Recognizing that some variances of income and wealth can and should be attributed to need and contribution, it seems to me that inequalities of income and wealth within the US and globally are far beyond what is morally acceptable. In the Roman Catholic tradition, excessive economic inequality violates the principles of the universal destination of goods and the right use of property. Further, excessive inequalities impede the realization of fundamental human equality by hindering the full social, political, and economic participation of persons. Furthermore, excessive economic inequalities impede the Roman Catholic value of solidarity because economic inequality is a barrier to getting to know and care for socio-economic others. Finally, the Roman Catholic tradition understands excessive economic inequalities as a threat to peace.

The extent of contemporary economic inequality can be seen in the example of the US. In 2001 the lowest twenty percent of households in the US earned an average of $14,900 per year, while the wealthiest one percent of households earned $1,050,100 per year. Even more dramatic is the disparity in wealth between the bottom forty percent and the top one percent of wealth holders in the US. In 2001, the average net worth of the top one percent of Americans was $12,692,100, while the average net worth of the bottom forty percent of Americans was $2,900. The level of inequality in the US hinders the full social, political, and economic participation of persons by stratifying educational attainment – the rich get more and better education while the poor and middle class get less and lower quality. More and better education leads to better paying jobs.


\[335\] Ibid., 289.
More income and wealth (acquired through better paying jobs) leads to a higher rate of political participation and political influence.

As a starting point for talking about relative economic equality of income and wealth, I propose thinking in terms of a 7:1 ratio; that is the income and wealth of the wealthiest Americans should not exceed seven times that of the poorest Americans. The model of a 7:1 ratio is inspired by the Scott Bader and Ben and Jerry’s corporate models where the highest paid workers could not earn more than seven times the lowest paid workers. Further, the 7:1 ratio approximates the amount of economic equality necessary for promoting solidarity and peace. That is, if I have adequately shown that the current amount of economic inequality in the US is too much and that it hinders solidarity (i.e., leads to socio-economic segregation in the form of gated communities and ghettos), participation (i.e., the wealthy participate more in social, economic, and political decision-making) and peace (i.e., it leads to conflict between socio-economic groups), which are ethical values of the Roman Catholic and Quaker traditions, then a more adequate limit on the rich-poor gap is necessary. To be clear, the 7:1 ratio I suggest is an approximation of what might be sufficient to promote solidarity, participation, and peace.

The rationale for 7:1 is rooted in the current data on inequality of income and wealth and the extent to which solidarity and participation are impeded in our current context. We have already reviewed the extreme differentials between the incomes of the top one percent and the bottom twenty percent (70:1) and between the wealth of the top one percent and the bottom forty percent (4376:1). The income differentials between the
top five percent and the bottom twenty percent (12:1)\textsuperscript{336} and the top twenty percent and the bottom twenty percent (7.3)\textsuperscript{337} are significantly less, yet still tremendously significant in terms of the giving individuals and families access to the goods they have reason to value and in terms of solidarity and social, economic, and political participation. Similarly, the wealth differential between the top five percent and the bottom eighty percent (22:1)\textsuperscript{338} This is much less dramatic than the ratio of the top one percent to the bottom forty – 4376:1 – but the top five percent of wealth holders are almost certainly among those who segregate themselves in gated communities and participate more and wield more influence in the political process.

In proposing a 7:1 ratio, I am suggesting that the 12:1 ratio between the incomes of the top five percent and the bottom twenty percent is too much. Similarly, the 22:1 ratio between the wealth of the top five percent and the bottom eighty percent is too much. The 7:1 ratio is aimed at getting to a place where solidarity is fostered and social, economic, and political participation, influence, and power are more widely shared.

The model of a 7:1 ratio is justified in the Catholic tradition by the principles of the universal destination of goods and the right use of property, and the values of social, political, and economic participation and solidarity.\textsuperscript{339} That is, the goods of creation are destined for all: “God intended the earth and all it contains for the use of every human


\textsuperscript{337} Ibid., 20.

\textsuperscript{338} Mishel, Bernstein, and Allegretto, The State of Working in America, 283. The ratio is based on average household wealth in the US in 2001.

being and people. Thus . . . whatever the forms of ownership may be . . . a man should regard his lawful possessions not merely as his own but also as common property in the sense that they should accrue to the benefit of not only himself but of others” (GS 69.1). More concretely, the Second Vatican Council indicated that the principle of universal destination means that human beings have a right to a sufficient amount of goods for the purpose of realizing their human dignity (GS 69.1). The principle of the universal destination of goods has implications for the right use of property. The Second Vatican Council indicated that the principle of right use means: (1) human beings are obligated “to come to the relief of the poor, and to do so not merely out of their superfluous goods”; (2) similar to number one, individuals and governments are obligated to share their goods; and (3) persons in extreme necessity have the right to take what they need from the wealth of others (GS 69.2). The failure of our current system to ensure that the goods of the earth are reaching all indicates that a different regulatory framework is needed. Further, if solidarity and the social, economic, and political participation of all are facilitated by relative equality, then a correct sharing of goods (universal destination) occurs within a framework of relative equality.

While the principles of universal destination and right use of property have been interpreted to emphasize minimal distributive requirements (i.e., like Leo XIII calling for the meeting of basic necessities out of superfluous goods), they can and ought to be interpreted to inform a more egalitarian interpretation of distributive justice, particularly if necessities are understood as relative. That is, if the material content of a “sufficient amount of goods” is understood in relation to the amount of goods that others possess, then it would be reasonable to conclude that applying the principle of universal
destination to the distribution of income and wealth includes working toward a
distributive scheme in which limiting the gap between rich and poor is the goal because
relative economic equality is necessary if the participative dimensions of human dignity
are to be realized. Stated differently, right use could come to mean working toward a
distributive scheme in which the gap between rich and poor is limited to 7:1.

The key concept for understanding the relative nature of the moral imperative of a
just distribution is the concept of material goods as social goods that mediate social,
political, and economic participation. On the one hand, the nature of material goods
necessary for social, political, and economic participation is determined by socio-
economic context. As both Hicks and Robert Frank note, socio-economic context
influences the determination of “necessary” goods because what is necessary for social,
political, and economic participation is relative to the consumption standards of particular
societies.340 Both Hicks and Frank use an example from Adam Smith’s, An Inquiry into
the Nature and Causes of the Wealth of Nations to underscore the importance of this
point, even for neo-classical economists.341 In Smith’s words:

By necessaries I understand not only the commodities which are indispensably
necessary for the support of life, but whatever the custom of the country
renders it indecent for creditable people, even the lowest order, to be without.
A linen shirt, for example, is, strictly speaking, not a necessary of life. The
Greeks and Romans lived, I suppose, very comfortably though they had no
linen. But in the present times, through the greater part of Europe, a creditable
day-labourer would be ashamed to appear in public without a linen shirt, the
want of which would be supposed to denote that disgraceful degree of poverty
which, it is presumed, nobody can well fall into without extreme bad conduct.
Custom, in the same manner, has rendered leather shoes a necessary of life in

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340 Hicks, Inequality and Christian Ethics, 192. Robert H. Frank, “How the Middle Class is
Injured by Gains at the Top,” in James Lardner and David A. Smith, eds., Inequality Matters: The
Growing Economic Divide in America and Its Poisonous Consequences (New York: The New Press,
2005), 139.

341 Hicks, Inequality and Christian Ethics, 192 and Franks, “How the Middle Class is Injured by
Gains at the Top,” 139-40.
England. The poorest creditable person of either sex would be ashamed to appear in public without them.\textsuperscript{342}

It is easy to see that standards in the US in 2006 are different from the standards in eighteenth century England. A linen shirt and leather shoes are not necessary for social inclusion, but certain standards of dress are necessary for participating in varying professions. Further, transportation, often private transportation, is necessary for access to employment and housing in a “good neighborhood” is often necessary for access to quality public education.

I also want to take the argument about what is necessary for social, political, and economic participation one step further. That is, I propose that in order to enable meaningful social, political, and economic participation for everyone, a value which the Roman Catholic tradition prescribes, the distance between rich and poor must be lessened. This is because dramatic disparities between rich and poor hinder social, economic, and political participation. One illustration of this is in the political sphere. Those with more income and wealth are able to use their wealth to influence public policy by financing political candidates, and in so doing they gain influence. As previously noted, 86\% of those with annual family incomes over $75,000 vote while only 52\% of those with family incomes of less than $15,000 per year vote; 56\% of those with annual family incomes over $75,000 make political contributions, while only 6\% of those with family incomes under $15,000 per year do, and 50\% of those with annual family incomes over $75,000 contact public officials, while only 25\% of those with family incomes

\textsuperscript{342} Adam Smith in Franks, “How the Middle Class is Injured by Gains at the Top,” 139-40.
incomes under $15,000 per year do.\textsuperscript{343} Perhaps even more striking is the fact that both the Democratic and Republican parties solicit active participation from wealthier voters. That is, the average family income of those asked by a fellow partisan to work for or contribute to a political campaign \textit{for either party} was roughly $50-55,000 in 1990.\textsuperscript{344}

Dramatic disparities in income and wealth also hinder social solidarity. The Catholic virtue of solidarity, as John Paul II said, is more than “a feeling of vague compassion or shallow distress at the misfortunes of so many people, both near and far” (SRS 38.6). Rather, solidarity is “a firm and persevering determination to commit oneself to the common good . . . the good of all and of each individual, because we are all really responsible for all” (SRS 38.6). The impediment of a substantial gap between rich and poor to solidarity can be seen in housing patterns. In the cities in which I have lived in the last thirteen years – South Bend, Indiana; Nashville, Tennessee; and Columbia, South Carolina – housing is socio-economically segregated. That is, each city had distinct areas that are poor, middle-class, and wealthy. In South Bend, the west-side of the city is noticeably run-down and its residents have the lowest median income in the city -- $13,410-22,716 according to the 2000 census.\textsuperscript{345} The west-side also has fewer


\textsuperscript{345} I am looking specifically at census tracts 17, 19, 20, 21, and 23. See US Census Bureau, Census 2000 Summary File 3, Matrix P53. Available at \url{www.factfinder.census.gov}.  

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people with high school and four-year college degrees – anywhere from 50-67% of those over the age of twenty-five have graduated from high school while roughly 1.3-14.8% of those over the age of twenty-five have four-year college degrees.\textsuperscript{346}

The east-side of South Bend, conversely, is noticeably wealthy. Here the houses are large and well-kept; the lawns are impeccably manicured. Median income on the east-side is roughly $47,393-54,590.\textsuperscript{347} Somewhere between 88.2 and 94.3% of those over the age of twenty-five have high school diplomas and 45.4-54.2% of those over age twenty-five have bachelor’s degrees or higher.\textsuperscript{348}

It seems, then, that at least on the face of it, there is a relationship between income, education, and where we live. What would be really interesting to know is the impact this has on future generations. That is, will those growing-up in lower-income neighborhoods with parents who have less education repeat this pattern in South Bend? There is evidence that income inequality – not housing patterns per se – impact educational expectations and attainment. A study by the national Advisory Committee on Student Financial Assistance found that ninety-five percent of eighth-graders from high-income families (those with an annual income over $75,000) expected to graduate from college; eighty-three percent of these students went on to enroll in college and sixty-two percent of them graduated.\textsuperscript{349} Only seventy percent of low-income eighth-graders (those with annual family incomes of less than $25,000) expected to graduate from

\textsuperscript{346} Ibid., Matrix P37.


\textsuperscript{348} Ibid., Matrix P37.

college; only fifty-two percent of these went on to enroll and a mere twenty-one percent graduated.\(^{350}\)

It also seems that there is very little interaction between those living on the east and west sides of South Bend. Thus, the wealthy do not know and subsequently do not understand or sympathize with the struggles of the poor. The consequence of this is that the interests of the poor are not adequately addressed in the political sphere because those who are most active in the political sphere are the wealthy.

The Roman Catholic tradition also connects excessive economic inequality and violence. In the words of Paul VI “excessive economic, social, and cultural inequalities among peoples arouse tensions and conflicts, and are a danger to peace” (PP 76). The connection between socio-economic inequality and physical violence is illustrated in studies of ethic conflict. For example, Sriskandarajah has shown that in Sri Lanka even when the socio-economic inequality between ethic groups is relatively small, economic inequality \textit{within} ethnic groups serves to politicize relatively small disparities between groups and heighten conflict and violence. Thus, he suggests that public policies should be formulated that address both real and perceived inequalities in order to resolve ethic conflicts.\(^{351}\)

A Catholic theology of work has the potential to either support or impede an ethic of relative economic equality. A theology of work that emphasizes the unitive dimensions of work, that is work as a continuation of the work of Christ (MM 259) or work as a communal activity that “brings together . . . the wills, minds, and hearts of

\(^{350}\) Ibid.

men” (PP 27) can provide a theological rationale for more equitably sharing one of the fruits of work – profit. At the same time, a theology of work that places too much emphasis on the subjective dimensions of work – work as a means to self-realization, where the real value of work is found in self-development – risks obscuring the problem of dramatically unequal compensation for work. That is, those with the authority for setting wages and distributing profits can stress the value of self-realization found in work to detract from and de-emphasize differences in remuneration.

This is not to say that John Paul II, who presented, in its most elaborate form, the idea of the subjective dimension of work, intended to obscure the problem of equitable remuneration for work. In fact, he drew from his theology of work the moral norms of full employment at a living wage. But even emphasis on a living wage, unless it is understood as relative to the wages of others, can obscure the problem of the gap between those at the bottom and those at the top.

A Catholic theology of work supports an ethic of relative economic equality when it is used to help explain why the gap between those at the top and those at the bottom should be limited. That is, an explanation of the unitive and subjective dimensions of work can morally justify limiting the gap between rich and poor. An income and wealth gap that is too large divides rather than unifies human beings because such a gap increases differences in social, political, and economic interests. The subjective dimension of work, instead of being stressed to placate those at the bottom, can and should be used to persuade those at the top that differences in the objective dimension of work do not justify dramatic differences in compensation.
The distributional model of a 7:1 ratio recognizes difference in contributions to the firm and at the same time indicates that there is a limit to monetary compensation for those differences. This model is applicable to society as a whole because excessive disparities in income and wealth create barriers to solidarity, participation and peace. That is, the 7:1 ratio acknowledges differences in contribution but indicates that there are limits on the acceptable amount of inequality of income and wealth.

The fact that both Scott Bader and Ben and Jerry’s were unable to maintain the 7:1 ratio – that is, they were unable to find and hire qualified corporate executives for the salaries they were offering in the late 1980s and early 1990s, and they were unable to maintain the 7:1 ratio by increasing the salary of workers in order to offset a rise in executive pay – seems a moral and structural failure. The fact that the 7:1 ratio could not – or was not – maintained is a moral failure because individuals could not be persuaded of the value of relative economic equality. The fact that the 7:1 ratio could not – or was not – maintained is a structural failure because the economic systems in the US and Great Britain set no upper limits on executive pay, which had the effect of encouraging the escalation of executive pay that has occurred in the last sixteen years.³⁵² It seems that in order for such a distributional scheme to work, there would have to be a communal consensus to implement it. That is, the 7:1 model failed at Ben and Jerry’s and Scott Bader because they could not hire qualified executives because these executives could earn significantly more at other companies. Thus, in order for the 7:1 model to work, it would seem that there would need to be a change in individual and collective attitudes to

³⁵² In 1965, CEO’s in the US earned twenty-four times more than the average worker. Between 1978 and 1989, this rate climbed from 35:1 to 71:1. The disparity between CEO and average worker pay in the US hit an all time high at 300:1 in 2000. The most recent data from 2003 indicate that this ratio has fallen to 185:1, which is still remarkable, particularly in light of comparisons to earlier ratios. See Mishel, Bernstein, and Allegretto, The State of Working in America, 214.
value relative equality and a change in regulatory frameworks – i.e., there would need to be some sort of collective agreement within political communities that limiting economic inequalities is desirable. This type of regulatory framework is supported by the Catholic principle of subsidiarity. That is, the principle of subsidiarity indicates that local public authorities and intermediary groups should be the point of departure for initiatives aimed at promoting the common good. But if the common good cannot be achieved at the local level, then recourse can be made to higher levels of public authority (government). In the case of a regulatory framework for relative economic equality, the examples of Ben and Jerry’s and Scott Bader indicate that individual businesses have serious difficulty withstanding the pressure for high executive salaries without national regulation of the gap between wages at the top and bottom.

5.4 Toward a Quaker Ethic of Relative Economic Equality

In the Quaker tradition the most important resources for an ethic of relative economic equality are the testimonies of equality, peace, simplicity and stewardship as well as Quaker decision-making practices and a spirituality of work.

The testimony of equality is an important resource for an ethic of relative economic equality, construed as limiting the income and the wealth of the wealthiest to seven times that of the poorest, because it provides the primary theological justification for relative economic equality. As discussed in Section 1.1 of this chapter, the Quaker tradition draws the conclusion that human beings are equal before God from the belief that there is that of God in every person. The Quaker tradition further understands equality before God to mean that human beings are equally valued by God and as such they are due equal respect. Respect, like any other human interaction, is mediated
through material goods because of their social nature. Vast disparities between rich and poor work against equal respect because of the attitude of superiority that such inequalities bring. The recent case of the alleged rape of a low-income African-American woman by two members of the mostly white, mostly upper class Duke University lacrosse team is an example of a lack of equal respect fueled by privilege and disadvantage. Eugene Robinson has colorfully summarized the context of the case:

A bunch of jocks at an elite university in the once-segregated South – privileged white kids who play lacrosse, a sport that conjures images of impossibly green suburban playing fields surrounded by Range Rovers of doting parents – decide to have a party, so they call an escort service and hire a couple of strippers. The hired help arrives: two black women, one of them a twenty-seven year old single mother who is working her way through North Carolina Central University, a proletarian institution across town. Within a few hours the woman becomes the “accuser” when she tells police she was raped.  

Robison goes on to point to the idea that racial and gender differences and socio-economic distance promote a lack of respect in this case:

That’s the basic scenario, and it is impossible to avoid thinking of all the black women who were violated by drunken white men in the American South over the centuries. The master-slave relationship, the tradition of droit du seigneur, the use of sexual possession as an instrument of domination – all this ugliness floods the mind, unbidden and refuses to leave.

Then there’s the fact that Duke has never shaken the aura of preppy privilege, its reputation as a place where students are arrogant in their sense of superiority.

The case illustrates the connection between racial, gender, and class inequalities. It also points to the importance of the distance between rich and poor as a source of elitism and feelings of social superiority that hinder equal respect. That is, it is in part the

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354 Ibid.
relative wealth of the Duke lacrosse players and the lower economic status of the woman that led to the alleged disrespect the Duke players showed the woman in this case. Application of the Quaker testimony of equality, and its norm of equal respect, also illustrates why the Quaker testimony has and should continue to evolve beyond an emphasis on spiritual equality: socio-economic equality facilitates the realization of spiritual equality and socio-economic inequality facilitates the violation of the human dignity.

Realization of equality, in the Quaker tradition, also requires that human beings have independence and control over their own lives. In order to have independence and control over one’s own life, one must be able to participate equally in social, political, and economic life. In the case of the Duke lacrosse players and the woman accusing three of them of rape, it does not seem as if they were participating equally in social life. The Duke players seem to have a sense of entitlement and social superiority that is demonstrated by their ability to hire a student from another university to salaciously entertain them. Further, as noted in chapter one and in section 5.3 of this chapter, there is a relationship between income and political participation. Those with higher incomes vote at a higher rate, contact political officials more frequently, and are asked to work for and contribute more frequently to political campaigns in both of the major political parties in the US. While these data do not demonstrate a correlation between the distance between rich and poor and political participation, they do demonstrate that those who are currently better-off financially are those who are currently participating in the political processes of the US. If the voices of the poor are absent in the political process, they do

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355 See chapter one pages 15-16.
not have control over the policies that affect their lives such as tax policy or policies pertaining to education, the environment, and employment.

The peace testimony is an important resource for an ethic of relative economic equality, construed as limiting the income and the wealth of the wealthiest to seven times that of those at the bottom of the distribution, because through it Friends link the problems of poverty/economic inequality/economic injustice and violence. In 1660, a few short years after the founding of the Society of Friends, leaders of the Quaker movement declared that Friends “deny all outward wars and strife, and fighting with outward weapons, for any end, or under any pretenses.” Following this condemnation of war, Friends came quickly to proscribe, within their Society, the practices of participating in or profiting from war by participating in war industries. Thus, a part of Friends’ ethical code included not bearing arms in war and not making a profit from war. Friends have also consistently worried about whether the seeds of war lay in their possessions. The most eloquent and most frequently quoted reflection on the link between economics and war has been that of John Woolman:

O that we who declare against wars, and acknowledge our trust to be in god only, may walk in the light, and thereby examine our foundation and motives in holding great estates! May we look upon our treasures, the furniture of our houses, and our garments, and try whether the seeds of war have nourishment in these our possessions.

In the late twentieth century, Friends expanded their definition of violence to include “psychological, economic [and] systemic” forms. That is, Friends came to

\[356\] This declaration is repeated in most editions of Friends’ books of faith and practice consulted for this study.


\[358\] Ibid., 77.
understand violence as not only physical, but as having more subtle forms. PYM does not provide examples of psychological, economic, and systemic violence, but I infer, from its concern for equality and economic justice, that PYM could perceive gross economic inequality, which has the effect of leaving many marginalized, to be a form of economic violence. For example, the kind of economic inequality brought to light in New Orleans in the wake of Hurricane Katrina, which had the effect of leaving the poor, the elderly, and the disabled without the means to evacuate is a form of economic violence.

The testimonies of simplicity and stewardship are important resources for a Quaker ethic of relative economic equality, construed as limiting the income and wealth of the wealthiest to seven times that of the poorest. The Quaker tradition’s testimony of simplicity has been consistently constructed to suggest that Friends ought to avoid the pursuit of activities and the accumulation of possessions that inhibit steadfast devotion to the Kingdom of God. For the Quaker tradition, the testimony of simplicity is a guide to regulating human desires and behavior.

The testimony of simplicity indicates that Friends have basic concepts of “enough” and “too much.” “Enough” includes a comfortable healthy home, adequate education, suitable recreation, provision for old age and disability and for reasonable security and freedom. “Too much” is having more than is required to meet basic needs. Clearly, an important issue is how to measure and provide concrete content to the categories “enough” and “too much.” Friends, at least in their most recent Faith and

359 Ibid., 75.
Practice texts are not specific about the precise content of “enough” and “too much.”

Even the description of “enough” from 1935 leaves much room for interpretation. As a resource for an ethic or relative economic equality, the Quaker testimonies of simplicity and stewardship leave room for an interpretation of “enough” and “too much” in relative as well as absolute terms. That is, how much is enough or too much can be absolute; for example, the amount of calories and nutrients needed by individuals can be precisely measured, but enough and too much are related also to the goods/resources that are available in the community as a whole. So, for example, how much wage or salary is “enough” is related to how much income and profit a firm or nation generates. In contemporary society, a 7:1 ratio is a starting point for debating upper and lower limits of the income and wealth distributions.

A Quaker spirituality of work, which emerges out of the testimony of simplicity, is an important resource for a Quaker ethic of relative economic equality because it emphasizes that work ought to be oriented toward a common good. That is, work is about more than earning an individual or family livelihood. Work is about making a contribution to the community. De-emphasizing the monetary rewards of work can, however, cut two ways. On the one hand the ideal of work as contribution can be used to obscure inequalities of income and wealth. On the other, an understanding of work as contribution to communal life can be used to motivate more equal compensation for work. That is, every job making a contribution to communal living is important – from that of the least paid service worker to the highest paid corporate executive. If we understand work in terms of community service, it is difficult to justify the current
extreme gap in pay between least and highest paid in terms of skills required or competence.

Quaker decision-making process is an important resource for an ethic of relative economic equality because it embodies the Quaker testimony of equality and serves as an analogy for the relationship between equality and participation in society. The Quaker decision-making process is radically egalitarian. All members and attenders of a Quaker Meeting are expected and encouraged to participate in decision-making. The tradition affirms that “new openings to truth may come at any time and from any source.”

Within the tradition, then, each Friend is considered to have a significant (and empowering) responsibility. Further, as Michael Sheeran notes:

> In Quaker decision making, it is generally presumed that each participant seeks the best solution; it is also generally presumed that the group, by searching together, can reach a correct solution. . . . The attitude demanded by Friends is one of openness to one another’s ideas – the ability to put aside pet notions in favor of the next person’s insight.

Sheeran cites the following example of Friends decision-making:

> The old burial ground in the meeting house yard was filled. Strong sentiment was expressed, when the matter was first discussed, both for and against the enlargement. Those in favor of enlargement pointed out the fact that many families could not be given space for burial without increasing the size of the plot and that failure to give space was unfair discrimination between families. Those opposed to enlargement showed that the proposed action would limit the playground of the school, situated on the same grounds, and that it made the section less desirable for residences. It must be understood that this subject was one on which many felt deeply. Those whose loved ones were buried in the tiny space allotted could not consider anything in connection with it dispassionately and it is not surprising that they could not. Others were

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equally unable to consider dispassionately anything affecting the life of the school children. To them it was a matter of interests of the dead against the interests of the living.

Since a decision seemed impossible on the first evening, the clerk made no minute and the problem was allowed to rest a month. It was not until six months later, however, that the question was settled and settled in a satisfactory manner. The strong emotional tone wore off, and several tempered their former statements, until at last it was decided to make a sufficient enlargement to the grounds to care for those now in membership and to make other arrangements for the future so that the question would not again arise. This small enlargement was made in such a way as to do no harm to the playground, and all seemed to approve of the clerk’s estimate of the sense of the meeting. Best of all the members did not feel that a weak compromise had been made, but rather that the very best plan had been followed.\textsuperscript{363}

This example illustrates the need for openness as well as “release from fear, from shyness, from reluctance to express one’s ideas” that is required in Friends’ decision-making process.\textsuperscript{364} While I am not suggesting that nations could select a president, a governor, or local representatives using Quaker decision making processes, I am suggesting that there are some values in this process that are instructive and analogous to the kind of social, political, and economic participation valued more broadly in US culture.

5.5 Common Ground in the Catholic and Quaker Traditions Regarding a Theology of Equality and an Ethic of Relative Economic Equality

On the one hand, the purpose of this study is to show that an ethic of relative economic equality is warranted within the unique conceptual frameworks of the Roman Catholic and Quaker traditions. That is, I have not wanted to generalize about a Christian Ethic that is abstracted from particular Christian communities. On the other hand, it is

\textsuperscript{363} Ibid., 50.

\textsuperscript{364} Ibid., 55.
important to know if there is any common ground across Christian communities to support an ethic of relative economic equality so that we can know whether it is possible to organize and motivate a coalition of religious groups to pursue greater equality of income and wealth within the US and globally. Stated differently, are the testimonies or principles of equality, peace, simplicity, and stewardship comprehensible outside of the theo-ethical framework of the Quaker tradition? Is a Quaker spirituality of work or Quaker decision-making comprehensible outside of the Religious Society of Friends? Similarly, are Catholic theological anthropology and the Catholic principles of universal destination, right use, solidarity, and participation intelligible outside of the theoethical framework of the Catholic tradition? Does a Catholic theology of work make sense outside of a Catholic context? Can these two traditions talk to each other and find some kind of common ground? Can they communicate with other religious and secular groups concerned about economic inequality?

While the vocabulary of the two traditions is unique and formulated within each tradition’s specific context, there is, I believe, some common ground. First, the theological anthropologies of the two traditions affirm human equality. Second, the Quaker testimonies of simplicity and stewardship are similar to the Catholic principles of universal destination and right use. Third, Paul VI’s claim that “development is the new name of peace” (PP 76) is similar to Quaker concerns regarding the seeds of war residing in one’s possessions. Fourth, the value of participation implicit in Quaker decision-making processes is very similar to the Catholic value of participation. Fifth and finally, a Catholic theology of work is similar to a Quaker spirituality of work.
Both the Catholic and Quaker traditions affirm that human beings are fundamentally equal. The Catholic tradition understands fundamental human equality to mean that human beings have equal dignity, and because human beings have equal dignity they have certain fundamental rights, such as the right to life and the right to a worthy standard of living, that must be respected. The Quaker tradition interprets fundamental equality to mean that all human beings are due equal respect. In both traditions, the fundamental equality of human beings is the root source of personal and social obligations. It seems that the common ground of fundamental human equality and the concomitant obligations stemming from this is a starting point for Catholic and Quaker cooperation toward the goal of relative economic equality. Similarly, equality is a secular value in the US, and as such ought to be a starting point for conversation about public policies aimed at supporting relative economic equality.

Secondly, the Quaker testimonies of simplicity and stewardship and the Catholic principles of the universal destination of goods and the right use of property all aim toward regulating the distribution of goods. The Catholic principle of the universal destination of goods indicates that all human beings have the right to a sufficient amount of goods for the purpose of realizing their human dignity. The principle of right use further guides the proper distribution of material goods in the Catholic tradition by subordinating the principle of private property to the common good. The Quaker testimonies of simplicity and stewardship guide Quaker attitudes toward material possessions. Important additions to the understandings of these regulative principles are the ideas that material goods are social goods through which social participation is mediated and social goods are relative to particular contexts. Thus, the quantity and
quality of goods necessary for realizing fundamental human equality are relative to the quantity and quality of goods held by others in one’s social context. The regulative principles of both traditions serve as means of formulating and evaluating suggestions such as mine that the income of wealth of the wealthiest should be limited to seven times that of the poorest.

Third, both the Catholic and the Quaker traditions have observed a connection between economic development and peace. The Catholic tradition has observed that economic underdevelopment is a cause of violence. The Quaker tradition has observed that attachment to material possessions can be a cause of violence. Additionally, the Quaker tradition implicitly has recognized economic inequality as a form of violence. Particularly with the most recent case of Hurricane Katrina in the US, the time is ripe for an investigation of economic violence.

Fourth, both the Catholic and Quaker traditions value participation. The Catholic tradition tends to focus on participation in the social, political, and economic spheres. The Quaker tradition, on the other hand, starts with the importance of participation in the decision-making processes of the Meeting community. The two traditions may both support greater economic equality because it leads to more and better participation, particularly in the political sphere. Similarly, participation is also a secular value and as such is a secular reason for supporting greater economic equality.

Finally, a Catholic theology of work, which stresses the unitive dimension of work and a Quaker spirituality of work, which stresses the contribution an individual’s work makes to the community, can both lead to an ethic of relative economic equality. Both emphasize the value of all work and undermine justifications for radical disparities
in compensation for different types of work. Both also undermine justifications for income and wealth gained without work.

5.6 Conclusion

In this project I have explored the moral significance of inequalities of income and wealth, not because they are the only goods human beings have reason to value but because they are the means of access to other valuable goods, like food, shelter, clothing, transportation, education, and health/health care. I have resisted theoretical frameworks that de-emphasize the importance of relative equality of income and wealth, like those of Michael Walzer, Amartya Sen, and Douglas Hicks, because of importance of income and wealth as a means to material goods, which, as Hicks helped me clarify, are social goods that mediate human identities and social participation.

One of my concerns has been to enhance the moral force of arguments against increasing inequality (or stated positively, to enhance the moral arguments for relative economic equality) because while news of increasing inequalities of income and wealth is ubiquitous, we seem to be doing very little to address inequality, particularly inequalities of income and wealth, as a social problem. As sources for moral arguments against inequality, I turned to the teaching documents of the Roman Catholic and Quaker branches of Christianity. I chose to draw on these two traditions because of their longstanding and visible commitments to working for social justice and also because of the striking differences in their organizational structure. The Catholic and Quaker traditions turned out to be instructive in an unexpected way – both evaded the problem of inequalities of income and wealth.
While the two traditions evaded the particular problem of inequality of income and wealth, both have conceptual resources which can be utilized to mount a vigorous critique of economic inequality both internally and in the public sphere. The resources within the Roman Catholic tradition that could and should contribute to an ethic of relative economic equality include an egalitarian theological anthropology, the principles of universal destination of goods and the right use of property, the virtue/value of solidarity, the value of participation, and a theology of work. That is, inequalities of income and wealth matter in the Roman Catholic tradition because they impede the actualization of the human dignity which stems from our fundamental equality before God. Further, dramatic inequalities of income and wealth violate the principles of the universal destination of goods and the right use of property. Importantly, significant inequalities of wealth and income impede human solidarity and the social, political, and economic participation of those at the bottom of the current unequal distribution. Finally, Catholic theology of work suggests that something other than self-interest and maximizing our own economic well-being ought to be at the heart of human work.

The resources within the Quaker tradition that could and should contribute to an ethic of relative economic equality include the testimonies of equality, peace, simplicity, and stewardship as well as Quaker decision-making processes and a Quaker spirituality of work. That is, inequalities of income and wealth matter in the Quaker tradition because they impede the realization of fundamental human equality. Further, inequalities of income and wealth are a source of violence, which, in the Quaker tradition is theologically significant. Finally, the testimonies of simplicity and stewardship as well as
Quaker decision-making and a Quaker spirituality of work all suggest that equality is something that is valued in the Quaker tradition.

In this project, I have been most concerned to show how the traditions can and should generate more internal dialogue about the problem of inequality. It is not at all clear from an examination of their teaching documents that they are prepared to make public arguments about economic inequality as a moral problem because they do not seem as if they are convinced that inequality, particularly in the form of inequalities of income and wealth, is a moral problem. Thus, in order to be the agents of social change that they have the potential to be, I have proposed the development of Catholic and Quaker theologies of equality as the foundation for robust ethics of relative economic equality. The development of theologies of equality would also, importantly, be an opportunity and a means to mounting an integrative theo-ethical critique of the interconnected inequalities associated with race, gender, and class.
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