

# **LIBERATION THEOLOGY: THE LATIN AMERICAN CHRISTIAN RESPONSE TO TRANSNATIONAL CAPITALISM**

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## **Abstract**

Latin America is a clear case of how the power structure shapes the destiny of a continent. With the arrival of Europeans in the New World in the fifteenth century, the period of modern history began for Latin America with a continent plentiful in natural and human resources, and the seemingly less generously endowed northern Anglo America. But five centuries later, while Anglo America has become the leader of the wealthy First World, Latin America has fallen into the desperate poverty of the Third World. The cause of this sharp contrast is to be found in the unequal relationships and power structures that have existed from the very beginning of the modern history of the Americas. Liberation theology emerged in Latin America in the 1970s as a response to the structural oppression of the Third World by the First World. Liberation theology has brought hope to the poor and the oppressed amid the revolutionary atmosphere of the Latin American continent. Latin America is the only Third World continent where the majority of people are Christian. Because of this, liberation theology is regarded as a Third World Christian response to the social injustice under transnational capitalism. Latin American historical experience and the history of liberation theology in the light of the political-economic realities of Latin America will be explored in this work. These include socio-political as well as doctrinal aspects such as the hermeneutics of the poor, the dependency theory, and the belief in salvation within history.

## **I. THE LATIN AMERICAN EXPERIENCE**

The divergence of the two basic historical trends in the New World is paradoxical: Anglo America and Latin America. Latin America at the

beginning enjoyed all the advantages of natural endowment. It was Latin America that supplied huge quantities of gold and silver bullion to Europe, grew the tropical products needed by the northern European market, and possessed a large native labor force for the mines and farmlands. Yet the seemingly less generously endowed and inauspicious Anglo America developed steadily from the colonial period onward, while Latin America emerged from that period dependent and underdeveloped, and has remained so until today. In this section, I will explore briefly the history and experience of Latin American peoples, from the early Native Americans to the present day Latin Americans, and the theories behind the contrast in power between Latin America and Anglo America, and the subsequent underdevelopment of Latin America.

### **A. The Early Native American Experience**

When Christopher Columbus first landed in the Bahamas, he reported that the gentle Arawaks showed “as much lovingness as though they would give their hearts...they remained so much our friends that it was a marvel”. “They are well-built people with handsome bodies and very fine faces”. But this same Columbus soon was writing back to Spain: “From here, in the name of the Blessed Trinity, we can send all the slaves that can be sold... Should your Majesties command it, all the inhabitants could be taken away to Castile, or made slaves on the island...for these people are totally unskilled in arms”. “They ought to make good and skilled servants, for they repeat very quickly whatever we say to them”. And “with fifty men we could subjugate them all and make them do whatever we want”.<sup>1</sup> In 1495 Columbus shipped five hundred Native Americans to Spain. Only three hundred survived the voyage to Spain, and most of them died within a few years because of European diseases for which they had no immunity. On the large island of Hispaniola (present-day Haiti and the Dominican Republic) Columbus ordered each Native American of fourteen years or older to bring one of his hawk bells filled with gold dust to his forts once every three months. When a Native American brought his or her tribute to the forts, he or she was given a copper token stamped with the month, to be hung around the neck. With that they were safe for another three months while collecting more gold. Whoever was caught without a token was killed by having his or her hands cut off. The gold quotas in Hispaniola proved impossible of fulfillment. The amounts recovered were quite inadequate, and those who tried

to escape to the mountains were hunted down with dogs and killed. The demoralized Arawaks often committed mass suicide, killing themselves with casava poison. Within two years about half of the island's population, estimated originally at 125,000 to 500,000, had died. By 1515 only 10,000 were still alive, and twenty-five years later the entire race had become extinct.<sup>2</sup>

Thousands of years of isolation left the Native Americans technologically and biologically vulnerable. By 1500 they had reached the technological level that Western Europeans had in 1500 B.C. and Middle Easterners in 3500 B.C. Although the plants domesticated by the Native Americans are so numerous and fruitful that today they provide almost half of the world's total food supply, they themselves never developed their cultivation techniques beyond the bare minimum of day to day necessity. Isolation and native beliefs also made them psychologically vulnerable. The Aztec ruler, Montezuma, mistakenly greeted Hernando Cortes as a god, paid homage to him and offered his throne and possessions. "Our lord...you have to come to your city, Mexico... I was in agony...with my eyes fixed on the Region of the Mystery. And now you have come out of the clouds and mists to sit on your throne again".<sup>3</sup>

In reply to such a magnanimous assessment, on March 1519 Cortes invaded the great Aztec Empire in Mexico. Landing on the mainland coast with an insignificant force of 600 men, 16 horses, 13 muskets, and a few cannon, he was able to conquer a wealthy empire with a population of tens of millions. In 1531 Francisco Pizarro conquered the highly organized Inca Empire of Peru with a band of only 180 men, 27 horses, and 2 cannon. Other Native American societies outside the Aztec and Inca empires lacked the population and organization to offer serious large-scale resistance. Hence the rapid White expansion in the New World with periodic armed clashes and scattered colonization wherever the land or mineral resources were sufficiently attractive.

By the end of the sixteenth century the Spaniards became familiar with the entire coastline of South America from the West Indies south to Tierra del Fuego and north to the Gulf of California. Likewise in North America, Francisco de Coronado and Hernando de Soto led wide-ranging expeditions across what was later to become the southern part of the United States, from Florida to the Grand Canyon. At the same time French explorers like Robert La Salle, English explorers like David Thompson, and American explorers like Lewis and Clark opened up the northern and western parts of North America, while the Portuguese were taking over

the vast Brazilian land in South America.<sup>4</sup>

The Native Americans had no immunity against the diseases the European and African newcomers brought with them. This posed as serious a problem as the brutal exploitation by the Europeans. The first epidemics which were the most deadly occurred well before the period of massive exploitation. The population catastrophically declined by epidemics as well as by brutal exploitation. This included a fall in the indigenous population in Mexico from a possible high of 25 million in 1519 to 6.3 million in 1548, and finally to 1.07 million by 1605. In Peru the depopulation was from a possible maximum of 7 million to 1.8 million by 1580.<sup>5</sup>

After destroying the native ruling establishment, the Spaniards were able to force the Native Americans to provide the heavy labor needed for the mines, where conditions were disastrous for both health and morale, and also labor for the haciendas--two of the three backbones of Latin America's economy. The third, the coastal plantations, had to depend on imported African slaves because of the scarcity of the Native American populations in the coastal regions. When the Portuguese established the first sugar plantations on the American mainland in Brazil, they found the indigenous population quite inadequate as a labor force, so they imported slaves from Africa.<sup>6</sup>

What is clear is that this European conquest led to a deterioration of living condition for the great majority of the Native Americans in Latin America. Some may argue that the Aztecs and the Incas had been subjected to forced labor by their imperial authorities before Columbus. But the fact is that they had experienced it within their own social and cultural context, which had continually preserved their own integrity and civilization. After Columbus they were exploited to near extinction by the arbitrary European invaders who cared nothing about the continuity of the indigenous races and cultures. The Native Americans have suffered under these demoralizing circumstances in Latin America up to the present time.

## **B. Latin America v. Anglo America**

When ask the question of why the initially affluent Latin America ended up as a dependent Third World continent and the seemingly less generously endowed Anglo America became the center of the developed world, there are a number of theories that may explain it. One theory suggests that the answer is to be found in the different levels of economic

development among colonial metropolitan centers. This position contends that during the colonial period, Anglo America was subjected to economically highly developed metropolitan centers, namely, Britain and France, whereas Latin America was controlled by the dependent economic structures of Spain and Portugal.

During that time, both the Spanish and Portuguese economies were dependent on the northwestern European countries. Despite their having an unprecedented lead in exploring the New World, the Iberian states could not adequately take advantage of the new opportunities because of their retarded economies. Northwestern Europe consequently won control over the trade between Spain and her colonies, despite the declared monopoly of the Spanish imperial trade. The imperial monopoly could not be enforced because Spanish industry could not meet the demands of their American colonies. With a similar retarded economy, Portugal lacked a home market and an industry to absorb the new wealth accumulated from her colonies in Asia and the Americas. This theory of the Iberian economies' subordination to northwestern European states explains why Latin America was exploited by the northwestern Europeans rather than the Iberians. But in itself it does not explain why Latin America should have become for many generations afterward an exploited Third World continent.

The theory proposed by L. S. Stavrianos is more convincing.<sup>7</sup> According to this theory, Anglo America's economic development and Latin America's underdevelopment are to be explained by the nature of the domestic colonial economies, rather than by the transmission of the economic conditions of their European metropolitan centers. The Anglo American economic structure, from the very beginning, progressively developed into a diversified and independent economy capable of further development. After their independence, Anglo America (the United States and Canada) successfully industrialized their countries and emerged as part of the newly developed First World. The Latin American economic structure, on the other hand, was from the very beginning confined to a monoculture plantation economy, subordinate to metropolitan centers. As a result, Latin America—with its 33 countries and half a billion population—has only been capable of economic growth but without overall economic development.

### **C. Roots of Latin American Underdevelopment**

The mines, haciendas and plantations of Latin America were the envy of northern Europe and Anglo America. Yet, because of the Latin American dependent economic structure, the profits from the mines, haciendas and plantations enriched northern Europe and Anglo America far more than they did indigenous Latin America. The mining industry had very few links to the rest of the local economy. The enormous bullion shipments from Latin America contributed very little to the overall economic development of the continent. A plantation economy by its very nature as dependent upon overseas demand was incapable of generating overall indigenous economic development. Only a few crops were grown, and this was determined by the price in metropolitan markets rather than by the needs of the local economy or population.

Under the Latin American dependent economic structure, the northern Europeans and the Anglo Americans served as the middlemen, transporting varied commodities and services, including manufactured and agricultural goods, fish, shipping, capital and technical expertise. They not only gained most of the profits from the trade but also developed broad-based economies at home with a self-generating development capability. In contrast to the broad-based, self-generating economies of northern Europe and North America, the monoculture plantation economy of Latin America served as a relatively static resource for the dynamic economic growth of the European states and eventually led the continent to the status of the Third World.

Monoculture meant the inefficient use of natural as well as human resources. It meant unemployment for a good part of each year, as well as inefficient performance during the work seasons. Neither slave labor nor tenant labor was highly productive, since there was little reward or incentive to stimulate production. Heavy capital investments for the growing and processing of a given crop also made it difficult to shift or to diversify. These various factors explain why plantation societies were capable of economic growth, or increased output of any particular crop, but not of any real economic development. The end result was that the most profitable Latin American colonies of the past are now among the most underdeveloped Third World countries in the world, while the least profitable colonies, the Anglo Americas, have become the leader of the First World.

## **II. THE HISTORY OF LIBERATION THEOLOGY**

Under the unequal relationship between the First World and the Third World, Latin Americans have recently sought to understand and explain their own situation of underdevelopment and poverty. Social scientists took a leading role in articulating the economic and political structures of Latin America and naming their own realities. In so doing, they declared intellectual and cultural independence from those in the advanced industrialized countries. After centuries of resistance, the church or parts of the church followed suit. Instead of interpreting Christianity in the traditional way, an increasing number of clergymen adopted the methodology of critical social analysis in their interpretation both of Christianity and of the Latin American situation. These clergymen emerged as liberation theologians. By working with poor people in Christian base communities amid the atmosphere of social revolution in the last few decades, they have created a significant theological movement, namely, liberation theology, which contributes to one of the most important developments, as I see it, in the history of Christianity.

### **A. Early Historical Development of Latin American Clergy**

From its first appearance in the New World, the Catholic Church was part of the overall colonization of the Native American peoples by Spain and Portugal. Some of the early missionaries, however, protested against the cruelty of the conquest. The most well known was Bartolome de las Casas, who came to Hispaniola in 1502. Las Casas became a Dominican priest in 1512. Although he himself had indigenous slaves, he struggled on their behalf. In the sixteenth century, some Dominican bishops were outstanding in their defense of the Native Americans. The bishop of Nicaragua, Antonio de Valdivieso, was even killed in 1550 by one of the governor's henchmen. Today's liberation theologians regard this early generation of bishops as their precursors.<sup>8</sup>

During the years 1808 to 1824 many countries in Latin America declared their independence from Spain and Portugal. The independence movement was led by the local elites, who were largely motivated by a nationalist ideology. The poor served in the armies that struggled for independence, but they received little benefit. The independence struggle brought a severe crisis to the Catholic Church. Many bishops sided with the Spanish, and the popes made pronouncements against the indepen-



dence struggle in 1816 and 1823. The Vatican only began to recognize the new states in 1831. During the independence struggle, however, some clerics such as Hidalgo and Morelos supported the independence movements.

After independence, the church became tied to conservative parties that battled against liberal parties in almost all countries. As a result of independence and attacks from liberal governments, the Catholic Church was in a situation of chronic weakness and crisis. One consequence is that most Latin American countries have never produced sufficient clergy and have depended on a steady flow from Europe. Today the Catholic clergy in several countries—Guatemala, Nicaragua, Honduras, Venezuela, Panama, Bolivia—is around 80 percent foreign.

Protestant missionary efforts began late in the nineteenth century. Liberal governments often regarded Protestants as representing “modernity” and used them for countering Catholicism. Despite impressive growth rates Protestants have remained a minority, and most Latin Americans continue to see themselves as Catholic. During the first half of the twentieth century Latin American Catholicism emerged with a new strength. The Catholic Action movements were growing among workers and students. In 1955 bishops from all over the continent met in Rio de Janeiro for the first plenary meeting of CELAM (Latin American Bishops’ Conference). They were also beginning to recognize and analyze the deep social problems of the continent.

## **B. The Emergence of Liberation Theology**

The crisis in Latin American societies and the effect there of the Vatican Council II and its aftermath had a great impact on the Catholic Church. Beginning in the 1960s, many priests, catechists, and sisters working at the local level began to raise questions about the social and economic order. Certain political events, such as the Cuban revolution and the repression in Brazil in the early 1960s, began to raise questions about the role of the church in Latin America.

During the Cuban revolution Christians played no important role in the overthrow of the Batista dictatorship. The Cuban government and Communist Party were officially atheist. There was virtually no theological linkage between Christianity and the revolution. In the late 1960s, however, Cuban bishops began to present a positive theological interpretation of the revolution. Inspired by Cuba’s example, rural revolutionary



movements arose in Venezuela, Guatemala, Peru, and some other countries in Latin America. In response, the Kennedy administration launched the Alliance for Progress, which combined development aid with an upgrading of armies and police to counter the revolutionary movements.

Under President Juscelino Kubitschek (1955-1960), the Brazilian government sought to solve the problems of economic development. The president himself used Christian language such as calling social injustice “a great sin against Christ”. The Catholic church joined the government in their unsuccessful efforts to solve the economic problems of the rural Northeast. At the same time, peasant leagues were becoming militant, and university students were working directly with the poor. Paulo Freire, an educator in the Northeast, developed a new method for teaching literacy through a process of conscientizacao (conscientization, or consciousness-raising). Catholic Action movements of students, workers and Catholic intellectuals became involved. Some Christians began to utilize Marxist social analysis. Meanwhile, the army became alarmed by the growing grass-roots militancy and staged a coup in March 1964. Many intellectuals, politicians, and popular leaders had to flee the country, and the church was largely silenced for almost a decade.

In 1962, with the initiative of Pope John XXIII, the second Vatican Council was held in an open atmosphere. In the council’s plenary sessions and working groups, progressive theological ideas and proposals were legitimized. The council led Latin American Catholics to take a much more critical look at their own church and their own society, and they began to ask questions that took as their starting point the socio-economic conditions of contemporary Latin America. In 1965, Camilo Torres, a Colombian priest, formed an organization called the United Front which linked together peasants, workers, slum dwellers, professional people, and others to pressure for basic change in that country. Shortly afterward, he joined the revolutionaries of the ELN (Army of National Liberation) and was killed in combat amid the revolutionary atmosphere of the mid-1960s.

Latin American social scientists were beginning to question the ideology of “developmentism” and proposed a new approach to the root problem of underdevelopment, which was known as the “dependency theory”. It was developed largely by Latin Americans as a kind of declaration of cultural and intellectual independence. At the same time, a group of eighteen Third World bishops issued a statement with a positive view of revolution. This statement of the “Bishops of the Third World” became

a starting point for the Movement of Priests for the Third World in Argentina, Peru, Colombia, Mexico, and elsewhere. This radicalized clergy played an important role since they were in more direct contact with the majority of poor people.

In August 1968 about 130 Catholic bishops met in Medellin, Colombia, for the task of applying Vatican II to Latin America. The Medellin meeting was the second plenary meeting of CELAM (Latin American Bishops' Conference); the first had been held in Rio de Janeiro in 1955. They denounced "institutionalized violence" and referred to it as a "situation of sin". In several places the documents supported the "base community" movement. Few such communities existed then, but they would soon become very widespread. One of the advisors at Medellin was the Peruvian theologian Gustavo Gutierrez. Gutierrez outlined a "theology of liberation" in a talk in Chimbote, Peru. That may mark the first use of the expression in Latin America.<sup>9</sup> During 1970 there were many conferences on the topic. In 1971 Gutierrez and Hugo Assmann, a Brazilian theologian, published full-length books on liberation theology.

The socialist Popular Unity coalition won national elections in Chile in 1970 and President Salvador Allende sought to carry out significant reforms. Many groups of Christians joined the socialist parties and movements. When the first sketches of liberation theology appeared in the late 1960s and early 1970s, several ways to basic structural change in society seemed possible. Despite the death of Che Guevara in Bolivia in 1967, revolutionary movements were on the rise in several countries. The 1970 election victory of Salvador Allende and his coalition held out hope that basic structural change could be obtained through peaceful elections. Similar coalitions were organized for elections in Venezuela and Uruguay.

In response to these progressive movements of the 1970s, the United States staged strong counterrevolutionary strategies. Military coups led to repressive governments in Brazil (1964), Bolivia (1971), Uruguay (1973), Chile (1973), and Argentina (1976). Moreover, existing military governments shifted rightward in Peru (1975) and Ecuador (1976). Repressive military rule continued in Paraguay and most of Central America. Only in Mexico, Colombia, Venezuela, and Costa Rica did formal democracy remain, but those governments were ready to utilize harsh repression.

After the Medellin conference the new progressive theological ideas spread rapidly throughout the continent. Each year hundreds of

priests and sisters were taking courses in CELAM's own training program. In 1971, however, things changed. The Belgian Jesuit Roger Vekemans set up a research center in Bogota, Colombia, and in collaboration with the ambitious Bishop Alfonso Lopez Trujillo began to attack liberation theology and propose an alternative kind of social analysis and theology. At the same time, Lopez Trujillo cultivated contacts in the Vatican and among Latin American Bishops in an effort to capture the administration of CELAM. In November 1972 Lopez Trujillo was elected secretary-general of CELAM. He then collapsed the several CELAM training institutes into one, which was located in Colombia where he could oversee it. The CELAM agencies became a platform for attacks on liberation theology.

The most important development within the church during this period was the quiet, steady growth of base communities. Base communities are a primary embodiment of liberation theology. In Brazil alone it is estimated that there are more than seventy thousand such communities with a total membership of two and a half million people. Phillip Berryman has defined church base communities as small lay-led communities, motivated by Christian faith, who see themselves as part of the church and who are committed to working together to improve their communities and to establish a more just society.<sup>10</sup>

Early in this century in Europe, the Belgian priest Joseph Cardijn began a new approach to young working people. He began holding small group meetings that emphasized not doctrine but action to solve people's problems, such as unjust wages, or union struggles. The method was summed up in three words "observe-judge-act".<sup>11</sup> Participants would observe by discussing the relevant facts, judge by deciding whether the situation was in accord with the gospel, and agree to act in some way, however, small. This movement thrived in Latin America during the 1950s.

In 1957 in a community called Barra do Pirai near Rio de Janeiro, Bishop Agnelo Rossi began training people to be catechists. The First Nationwide Pastoral Plan (1965-1970) of the Brazilian bishops was calling for subdividing parishes into "base communities". By the end of the 1960s the base-community model had gained wide acceptance. At Medellin the bishops stated that the church should become present in small local communities, forming a core community of faith, hope, and charity. CELAM (Latin American Bishops' Conference) training institutes in Chile, Colombia, and Ecuador spread the ideas and methodology of "base communities". Two priests, Jose Marins, a Brazilian, and Edgard Beltran, a

Colombian, traveled full-time giving courses on “base communities” throughout Latin America. Christian base communities were widespread in the 1970s and 1980s. They have continued their activities in solidarity with the poor until the present time.

Base communities provided a space in which people could meet in an atmosphere of respect and reaffirm their own faith and hope. They became a space where poor people could “speak their word” and where they heard that God was on their side. Such quiet work, however, provoked a violent response, and church representatives came under attack. In Brazil repression had been heavy since 1968, especially in the poor Northeast. There was an attempt to assassinate Archbishop Helder Camara of Recife in 1969, but no serious investigation was conducted by the authorities. Other priests in rural areas were arrested, jailed, tortured, or expelled. In Chile the brutality of the Pinochet coup (1973) provoked a wide-ranging response. In Bolivia, Uruguay, and Paraguay church involvement in human rights activities led to serious conflicts with governments. In Argentina Bishop Enrique Angellelli was killed in 1976. In Latin America as a whole, between 1964 and 1978, 41 priests were killed and 11 “disappeared”. In addition, some 485 were arrested, 46 were tortured, and 253 were expelled from the countries where they worked.<sup>12</sup>

The Puebla conference in 1979 seemed to provide Bishop Lopez Trujillo and his allies, including some Vatican officials, with the occasion for delegitimizing liberation theology. The Puebla conference, however, turned out to be a clash between three groups of bishops. The first were those conservatives who stressed hierarchical authority and doctrinal orthodoxy and who attacked liberation theology. The second were those liberation theologians who stressed base communities and the church’s mission for the poor and structural change. The third and the largest group might be called centrist. With the conservatives this group shared a concern for church authority, and with the liberation theologians a conviction to defend human rights, at least in extreme circumstances. The final document that emerged was inconclusive, and each of the three groups could find positive elements in it.

In 1979 a broad grass-roots movement led by the Sandinista National Liberation Front (FSLN) overthrew the Somoza dictatorship in Nicaragua. This was the first revolutionary government in Latin America in twenty years. In contrast to the Cuban revolution, Christians played important roles in the anti-dictatorial struggle in Nicaragua. Similar revolutionary movements were going on in El Salvador and Guatemala. The

United States, in its attempt to stop revolution, supported the Salvadoran regime and created a counterrevolutionary army (contras) to attack Nicaragua. During this period, church leaders played an important role in defending human rights, especially Archbishop Oscar Romero of El Salvador, who became known as the “voice of the voiceless”.

Latin American liberation theologians are indeed more conservative in doctrinal expression than many Catholic liberals in Europe and North America. The challenge comes from a way of doing theology in which the starting point is the situation of the poor. Systematic attacks on liberation theology within the church began around 1972. The so-called “Ratzinger letter” (“Instruction on Certain Aspects of the Theology of Liberation”, issued in August 1984) represents the major objections to liberation theology from the Vatican. Ratzinger’s critique is itself a highly condensed summary of more than a decade of criticism of the Latin American church. His position is that “hearts” must be converted before structures are changed, not the opposite way. Liberation theologians, however, do not believe that structures must be changed first. Rather, they argue that “hearts” are converted as people join together in solidarity to struggle for a more just world.

Meanwhile, political and economic situations in Latin America have changed. By the mid-1980s elected civilian governments replaced most military dictatorship. Humiliated by its defeat in war with Britain over the Malvinas/Falkland islands, the Argentine army was forced to withdraw from politics. Uruguay, Peru, Bolivia, Ecuador, and Honduras also returned to civilian rule. El Salvador allowed elections, and Guatemala returned to civilian rule through an election in late 1985. But these civilian governments were faced with a deepening economic crisis all over Latin America created by foreign debt. In August, 1985, the Cuban government hosted a meeting at Havana of some twelve hundred delegates from all over Latin America, among whom were some one hundred Catholic priests. During his closing address Premier Fidel Castro read a message to the conference from Cardinal Paulo Evaristo Arns of Sao Paulo which stated that Latin American governments’ most basic commitments were to their people, not to their creditors. Arns’ message has been well received by most Latin American people.

During July and August, 1988, many of the world’s leading theologians gathered at Maryknoll, New York, to honor Gustavo Gutierrez, the “father of liberation theology”. The occasion marked the twentieth anniversary of the Medellin Conference, Gutierrez’s sixtieth birthday, and

publication of the 15<sup>th</sup> anniversary edition of Gutierrez's classic, *A Theology of Liberation*. The original essays from this unprecedented gathering, published as *The Future of Liberation Theology*, are a unique, multi-faceted examination of contemporary liberation theology.<sup>13</sup>

### **C. Liberation Theology as Critical Reflection and Solidarity with the Poor**

In the late 1950s and early 1960s, Paulo Freire, a Brazilian educator, set a model for engagement with the poor through the method called "conscientization" (*concientizacion* in Spanish, or *conscientizacao* in Portuguese). This method dealt with one basic problem in the base communities of teaching peasants to read and write. Through the process of conscientization (or consciousness-raising), Freire assumed that the peasants were actually intelligent adults, that they only lacked the linguistic tools for reading and writing. Hence, they used words and images from the social reality of the peasants' world such as their crops, tools, customs, land tenure and the problems they were facing. Freire argued that conventional pedagogical methods treated people as empty recipients into which knowledge could be deposited. Freire and his associates, by contrast, assumed that even poor people are active agents in their own social and political life. Using a Socratic technique that moved from effects (their own poverty) to cause (the power structure) in society, they brought poor people to a critical consciousness.<sup>14</sup>

The experiment ended when the military staged a coup in 1964, and Freire himself had to leave Brazil. However, his ideas and methods spread rapidly as people attended his lectures in Chile, where he worked with the agrarian reform agency. He also gave talks in such places as the language and culture training center run by Ivan Illich in Cuernavaca, Mexico. Freire argues that Latin American poor people, like all human beings, are rational and political animals and have the capacity to enjoy or exercise freedom. He believes that through a conscientization process, poor people can decide by themselves what is best for them and how to achieve it. Freire himself has worked with socialist and revolutionary governments in Tanzania, Guinea-Bissau, and Angola. Freire's pedagogy contributed to the way Latin American liberation theologians dealt with their solidarity with the poor.

As Gustavo Gutierrez has pointed out, "Theology is reflection, a critical attitude. Theology *follows*; it is the second step".<sup>15</sup> In liberation

theology, critical reflection and solidarity with the poor come first, theology, second. Liberation theology is an interpretation of Christian faith out of the suffering, struggle, and hope of the poor. Poverty is seen as a product of the prevailing social structure. Liberation theology is, therefore, a critique of social, political and economic structures and the ideologies sustaining them—including the use of religious symbols. It also includes a critique of the church hierarchy from the angle of the poor.<sup>16</sup>

The critique of ideology, as Gibson Winter sees it, involves a hermeneutics of suspicion, an attempt to deconstruct a prevailing ideology in order to trace the interests that sustain it and the societal realities which it conceals.<sup>17</sup> As Gutierrez has pointed out:

It is for all these reasons that the theology of liberation offers us not so much a new theme for reflection as a *new way* to do theology. Theology as critical reflection on historical praxis is a liberation theology... This is a theology which does not stop with reflecting on the world, but rather tries to be part of the process through which the world is transformed.<sup>18</sup>

Or as another Peruvian priest put it:

As we see it, a perhaps faulty presentation of the Christian message may have given the impression that religion is indeed the opiate of the people. And we would be guilty of betraying the cause of Peru's development, if we did not stress the fact that the doctrinal riches of the Gospel contain a revolutionary thrust.<sup>19</sup>

Critical reflection always plays the inverse role of an ideology which rationalizes and justifies a given social and ecclesiastical order. For liberation theologians, the whole climate of the Gospel is a continual demand for the right of the poor to make themselves heard.

### **III. HERMENEUTICS OF THE POOR**

Whereas philosophy provided tools for classical theology, social theory provided analytical tools for Latin American liberation theology.



Liberation theologians have constructed their interpretations by utilizing the social sciences, particularly Marxist social analysis, Latin American history, and contemporary philosophical hermeneutics, but they have continually returned to dialogue with the poor concerning their social realities. In the 1979 Puebla conference, the Latin American bishops (CELAM) spoke with the language of the “situation of social sinfulness”, “preferential option for the poor”, and “social justice as the kingdom of God”.

Liberation theology emerged from work by priests, pastors, nuns and lay catechists in the Christian base communities and mass organization of the poor in Latin America. Contrary to the traditional church, which has supported social injustice by its links to the establishment or its silence about the unjust social system, liberation theologians have attempted to assume their responsibility for this structural injustice by working with the poor and the oppressed. Reading the Bible together has been an essential part of life in the base communities. From a hermeneutical perspective, liberation theology is an attempt to read the Bible and key Christian doctrines with the eyes of the poor. It is at the same time an attempt to help the poor interpret their own faith in a new way. The poor learn to read the scripture in a way that affirms their dignity and self-worth and their right to struggle together for a more decent life. The disciplined inquiry of a community of those who are committed to the struggle for justice and peace is, according to Gibson Winter, religious social ethics.

Religious social ethics has the task and privilege of opening the horizon of possibilities in a people’s struggle for justice and peace. These open horizons disclose possibilities of commitment and action. At this threshold, only a people can decide whether to continue in complicity with injustice or to begin resistance.<sup>20</sup>

As John Raines understands it, people in base communities find the meaning of their life and are able to name their own reality.

In Latin America, the church of the people has discovered that it is crucial to join the people *where they are*—especially if where they are is deeply enmeshed in despair—and encourage them to name their reality. No one else can do our naming for us. In speaking and in being heard and

responded to, we gain confidence, broaden our perspective, and begin to believe in our right to protest. The listeners support those who have just found voice in their task of liberating themselves from silence, from humiliation, from dependency and feelings of being incapable of self-direction. That is what the biblical command “Love thy neighbor” means. Real charity is finding out how much the rest of us can learn from the poor and then letting them teach us.<sup>21</sup>

From this experience came the idea of the hermeneutical privilege of the poor: a true reading of the Bible required the participation and perspective of the poor. Orthopraxis (right doing) comes before orthodoxy (right knowing). Ideas must be reconsidered in light of praxis which is the proving ground of all theory. This approach naturally led to an emphasis on certain themes and interpretations of the Bible. As Gutierrez has asserted, all the political theologies, the theologies of hope, of revolution, and of liberation, are not worth one act of genuine solidarity with exploited social classes.<sup>22</sup>

Leonardo Boff, a Brazilian former Franciscan theologian, has defined hermeneutics as the science and technique of interpretation by means of which we are enabled to understand the original meaning of any writings (or realities) no longer immediately comprehensible to men and women of today.<sup>23</sup> They understand the Bible in terms of their experience and reinterpret that experience in terms of biblical symbols. In theological terms, this is called the “hermeneutical circle”—interpretation moves from experience to text to experience.<sup>24</sup>

The function of theology as critical reflection on praxis has become more clearly defined in recent years. For liberation theologians, it has its roots in the first centuries of the Church’s life. They argue that the problem they pose is both traditional and new. Between us and the Bible, more than two thousand years intervene. People’s conceptual framework has changed, and words have acquired new meanings. Some passages are no longer comprehensible to people today. Therefore, hermeneutics plays an important role in the interpretation of the messages in the Bible. However, there are at least two ways of interpreting the Bible: metaphysical-ontological hermeneutics and socio-political hermeneutics.

The traditional Christian church interprets the Bible from the metaphysical and ontological point of view. This interpretation has be-

come the ideology of the establishment to sustain the existing unjust social system. For example, if Jesus' words about the poor being blessed and captives being liberated were interpreted only "spiritually" to mean inward poverty and the liberation from personal sin, this interpretation would serve an ideological function to maintain an unjust system.

Liberation theology interprets the Bible from a socio-political perspective. It makes use of Marxist social analysis in its interpretation of the Bible, and this brings a new dimension to the meaning of the Bible. The methodology of liberation theology is thus dialectical analysis, as Leonardo Boff puts it:

Dialectical analysis examines conflicts and imbalances affecting the impoverished and calls for a reformulation of the social system itself, in order to secure symmetry in the system and justice for all its members... Liberation theology holds that this is the analysis that better answers to the objectives of faith and Christian practice. And it is here that use is made of the analytical instrument devised by Marxist tradition.<sup>25</sup>

Liberation theology owes its methodology and social analysis to Marxism in its interpretation of the Bible and its understanding of contemporary situations in Latin America. But Roger Lancaster has a somewhat different idea on this point. He claims that Marx himself was influenced by pre-Marxist socialism. And pre-Marxist socialism was influenced by the Biblical message. For example, the Marxist idea that "from each according to his ability, to each according to his needs" was derived from the early church in the book of Acts (2:44-45, 4:32). So in this sense, Marxism owes its worldview in part to the early church. Liberation theology is, according to Lancaster, closer to pre-Marxist socialism than Marxism itself. In his prologue, "Theses on a Philosophy of Central American History", Lancaster summarizes the central message of liberation theology:

Liberation theology knows that the salvation of the poor is the common project of two faiths, Marxism and Christianity. And the theology of liberation itself emerges at the moment of contact between the Old Religion and Marxism. But the religion of hope is not thus merely some me-

chanical “new syncretism” of each, blending two old faiths to make a new one, as one might graft two trees together to make one. Rather, it only makes explicit what was implicit in the Old Religion. There is nothing “radical” about it. It sees itself as the most traditional and conservative version of Christianity, and takes the communism of the original church as its central message. This is its image of the past: an unbroken chain of oppression, running right up to the present. The Bible chronicles that history and future of the poor, on their long march to God and communism. The original message of Christ was revolution. If that message was lost, suppressed, or driven underground, it is the sacred charge of the orthodox to revive it.<sup>26</sup>

Lancaster’s claim that liberation theologians took the original message of Christ—to do justice to the poor and the oppressed—as their central message, and especially that socialism originally took the form of communalism in the early Christian church might be disputed, but it is undeniable that liberation theologians today have utilized the Marxist dialectics of class analysis and class struggle. The poor and the oppressed, according to Gutierrez, are members of one social class that is being exploited by another social class. An option for the poor means a new awareness of class confrontation. It means taking sides with the dispossessed. It means entering into the world of the exploited social class, with its values and its cultural categories. It means entering into solidarity with its interests and its struggles.<sup>27</sup>

Some liberation theologians have even made a quite obvious use of Marxism in their social and economic analysis. For example, in his book *The Ideological Weapons of Death*, Franz Hinkelammert, a German economist who has worked for twenty years in Latin America, follows closely Marx’s analysis of fetishism in *Capital*. Human beings at first produced “use-value” for their own subsistence such as a crop to eat. Later they began to produce goods for their “exchange-value”. Thus fetishism begins: human beings are dominated by the commodities they produce. Commodities become “subjects” while human beings become objects. Those who produce commodities—workers—are alienated from what they produce, hence their exploitation in their work and wages. Matters only become worse, with “money fetishism” and “capital fetishism”.<sup>28</sup>

## A. Historical Consciousness of the Defeated

Liberation theologians see that history has been written by the victors, the dominating classes. Historical consciousness has been made up and structured on the ideology of the dominant classes. History's winners, according to Gutierrez, have sought to wipe out their victims' memory of the struggles, so as to be able to snatch from them one of their sources of energy and will in history: a source of rebellion.<sup>29</sup> The winners have killed memory in the losers, so that now everyone's consciousness of history is that of the victors.

But rereading history means remaking history. It means repairing it from the bottom up. The aim of rereading history from the viewpoint of the defeated is a revision of this historical consciousness—especially the historical consciousness from the standpoint of the Native Americans, slaves, and other marginalized groups. As Leonardo Boff has pointed out, the purpose of this endeavor is to give Latin American peoples a genuine historical consciousness, without which they will remain rootless and deprived of the support needed to nourish their struggle for liberation.<sup>30</sup> This approach is uncovering new sources, and permitting new interpretations and outlooks very different from the official interpretation of the major events in the history of Latin American peoples.

In his book *Philosophy of Liberation*, Enrique Dussel, an Argentine philosopher, theologian and historian, has philosophized critically upon the historical consciousness of the metropolitan center. Dussel argued that thought that takes refuge in the center ends by thinking it to be the only reality. Outside its frontiers is nonbeing, nothing, barbarity, and nonsense. Ontology, the thinking that expresses Being—the Being of the reigning and central system—is the ideology of ideologies, the foundation of the ideologies of the empires, of the center.<sup>31</sup> He made explicit his philosophy of domination by referring to contemporary power structures:

The empires of the center—England and France as colonial powers, Nazi Germany, and later the United States with its Central Intelligence Agency (CIA)—thus once more possess an ontology that justifies them, a subtle ideology that gives them a “good conscience”.... Philosophy again becomes the center of the ideological hegemony of the dominating class.<sup>32</sup>

Dussel sees it as necessary to start historical analysis from the perspective of center/periphery, dominator/dominated dissymmetry, and from this dissymmetry to reinvestigate the history that has been written until now. From a historical, empirical viewpoint, Dussel argues, “If this philosophy (of liberation) is critical, if it criticizes the system, then this system must criticize it, must persecute it”. Philosophers who practice it have been targeted for bombings; they have been dismissed from their universities, expelled from their homelands; they have been condemned to death by the agents of imperialism, fascism, and the extreme right.

## **B. Poverty as Oppressed Condition**

The term “poverty” sometimes has ambiguous implications. It has both positive and negative meanings. Often people tend to be confused by the implications of what poverty means. Some may argue in the positive sense that poverty as material austerity could lead to rich spirituality and that rich people with self-indulgence may be poor in spirituality. This is true if poverty is among the free choices people could choose to live with. For example, if someone who has a middle-class standard of living chooses to live in a self-disciplined life with fewer material goods or takes a “vow of poverty”, this is his or her free choice. On the other hand, if someone who belongs to an underclass, who lacks the basic necessities of life such as adequate nutrition, clean water to drink, basic medical treatment when sick, a reasonable place to stay, and basic education was told to be happy with what he or she has for the sake of a “high spirituality”, this would be an ideology that conceals social oppression.

Liberation theology would argue that the material standard of living of the vast majority of poor and oppressed people needs to be raised to a decent level. Then and only then will these people have the ability to choose to live either in their ordinary way or in voluntary poverty in their personal pursuit of high spirituality. The religious meaning of poverty should not be used to confuse this distinction between forced poverty and voluntary poverty.

Gutierrez has defined the term “poverty” as material poverty, the lack of material goods and services necessary for maintaining life as a human being. Many Christians, according to Gutierrez, often mistake material poverty as a religious ideal-it is taken as austerity or detachment from the material world. For the well-to-do Christians, taking voluntarily a step of self-discipline or self-control from material indulgence is prob-

ably a good thing to do. But for millions, or even billions, of people who lack the basic material means of living necessary to life due to exploitation and oppression, it is a very different story. To force the majority of the world's population economically to live in dehumanizing material poverty is certainly not the purpose of Christianity.

Under the circumstances of the world's poverty today, Gutierrez has argued, to talk about spiritual richness and poverty is a misleading conception—it is an ideology intended to maintain the unjust social structure. This misleading conception portrays the cases of the rich who are spiritually poor as well as the poor who are spiritually rich. It is an ideology meant to keep the poor in their social class, without rebelling against it, in the hope for the reward of a life in Heaven. To be a complete human being, the basic necessities of this life need to be met. To be a complete human society, a fair distribution of wealth needs to be effected. Otherwise, it is only to play with words—and with people. As Gutierrez foresees, social classes, nations, and entire continents are becoming aware of their poverty, and when they see its root causes they will rebel against it.

In Christian terms, poverty is an expression of sin—a negation of love. It is not an interior detachment from the goods of this world. It is therefore incompatible with the teachings of Jesus and the coming of the kingdom of God—a kingdom of love and justice. Poverty is opposed to pride, to an attitude of self-sufficiency. So poverty needs to be taken as a commitment of solidarity and protest. Christian poverty has meaning only as a commitment of solidarity with the poor, with those who suffer misery and injustice. For Gutierrez, one cannot really be with the poor unless he or she is struggling against poverty.<sup>33</sup>

According to Gutierrez, if the ultimate cause of man's exploitation and alienation is selfishness, the deepest reason for voluntary poverty is "love of neighbor". Christian poverty, an expression of love, is solidarity with the poor and is a protest against poverty. Christians, therefore, do not choose to become poor out of a love for the ideal of poverty, but rather so that there will be no poor. Poor people today are the oppressed and the exploited ones—the ones marginalized in society, the members of the working class and underclass, struggling for their most basic rights, in a country struggling for its liberation. Poverty is different from the classic "renunciation of the goods of this world".



### C. Kingdom of God as Struggle for Justice

For liberation theologians, Christ is the temple of God. The Christian community is a temple, and each Christian, a member of this community, is a temple of the Holy Spirit. To cite a few passages from the Bible: “Surely you know that you are God’s temple, where the Spirit of God dwells. Anyone who destroys God’s temple will himself be destroyed by God, because the temple of God is holy; and that temple you are” (1 Cor. 3:16-17): “Do you not know that your body is a shrine of the indwelling Holy Spirit, and the Spirit is God’s gift to you?” (1 Cor. 6:19).

Furthermore, not only each Christian is a temple of God, every human being in history is the living temple of God. The “profane”—that which is located outside the temple—no longer exists. According to Gutierrez, if humanity—each human being—is the living temple of God, we meet God in our encounter with men and women, and in our commitment to the historical process of mankind.<sup>34</sup>

According to the Bible, to oppress the poor is to offend God, because what is done for others is done for God. To exploit the worker and to delay the payment of wages are to offend God: “You shall not keep back the wages of a man who is poor and needy, whether a fellow-countryman or an alien living in your country in one of your settlements. Pay him his wages on the same day before sunset, for he is poor and his heart is set on them: he may appeal to the Lord against you, and you will be guilty of sin” (Deut. 24:14-15; cf. Exod. 22:21-23).<sup>35</sup>

From these biblical messages, liberation theologians further develop that to love God is to do justice to the poor and the oppressed. Christians find God in their encounter with the poor, the marginalized, and the exploited. An act of love towards them is an act of love towards God. As Gutierrez has pointed out:

To know Yahweh, which in Biblical language is equivalent to saying to love Yahweh, is to establish just relationships among men, it is to recognize the rights of the poor. The God of Biblical revelation is known through interhuman justice. When justice does not exist, God is not known; he is absent.<sup>36</sup>

According to the Bible, Yahweh “deals out justice to the oppressed. The Lord feeds the hungry and sets the prisoner free. The Lord restores

sight to the blind and straightens backs which are bent; the Lord loves the righteous and watches over the stranger; the Lord gives heart to the orphan and widow but turns the course of the wicked to their ruin”. (Ps. 146:7-10). Accordingly, love of God is unavoidably expressed through love of one’s neighbor—especially the poor and the oppressed. To struggle for justice for exploited people is to love God. As Gutierrez sees it, to sin is to refuse to love, to reject communion and brotherhood, to reject the very meaning of human existence. The Bible indicates that where there is social justice and righteousness, there is knowledge of God; when these are lacking, it is absent. “There is no good faith or mutual trust, no knowledge of God in the land”. (Hos. 4:1-2; Cf. Isa. 1).

According to Gutierrez, the concept of neighbor needs to be reinterpreted within the socio-economic context:

As it has been insisted in recent years, the neighbor is not only man viewed individually. The term refers also to man considered in the fabric of social relationships, to man situated in his economic, social, cultural, and racial coordinates. It likewise refers to the exploited social class, the dominated people, and the marginated race.<sup>37</sup>

This point of view is beyond the individualistic relationship. It is also necessary to avoid the ideology of an individualistic charity. Charity today is, according to Gutierrez, a “political charity”. Often, to offer food or drink in our day is a political action. It benefits socially those who perform this political ritual of individualistic charity. It benefits temporarily only a few poor people without solving the root cause of their poverty. True charity needs to be a radical change in the unjust social structure so that justice is established and all benefit from it.

From this new dimension of critical reflection in the interpretation of the Bible, liberation theologians place the emphasis on the “kingdom of God”. For them, the central messages of Jesus are not God, nor the church, nor Jesus Christ himself, but the kingdom of God. The kingdom of God is justice for all poor and oppressed people. The struggle for justice is the struggle for the kingdom of God. Jesus himself was born poor. He chose to live with poor people for his whole life. And his message is to establish the kingdom of God—to bring justice to the poor and the oppressed in society. As Gutierrez has pointed out:

Conversion means a radical transformation of ourselves; it means thinking, feeling, and living as Christ-present in exploited and alienated man. To be converted is to commit oneself to the process of the liberation of the poor and oppressed, to commit oneself lucidly, realistically, and concretely. It means to commit oneself not only generously, but also with an analysis of the situation and a strategy of action.<sup>38</sup>

And as Leonardo Boff puts it:

In contact with the poor, who constitute a whole exploited social class, a person experiences a genuine encounter with the Lord and makes a commitment to justice, which is the prime characteristic of the kingdom of God.<sup>39</sup>

The kingdom of God necessarily implies the reestablishment of justice in this world. Christ reveals himself to humankind by identifying himself with the poor. To place oneself in the perspective of the kingdom of God means to participate in the struggle for the liberation of the oppressed. Equally important, the process of liberation requires the active participation of the oppressed themselves.

From socio-political hermeneutics, social injustice is the result of social structures rather than of people's intentions. In his book *Marx and the Bible*, Jose Miranda, a Mexican liberation theologian, calls this social injustice "institutional robbery". He claims that most of the exploitation today is legal. Private ownership under monopoly capitalism is a form of legalized and institutionalized robbery. He also asserts the biblical presupposition that excess wealth is unacquirable without violence and spoliation. Therefore, almsgiving is nothing more than the return of what has been stolen, and thus the Bible calls it justice. According to Miranda, there is a relationship between social analysis and faith in the Bible. Where social analysis says "structural poverty", faith will say "structural sin". Where social analysis says "private accumulation of wealth", faith will say the "sin of selfishness".<sup>40</sup> In liberation theology, another central theme of the messages in the Bible is in the relationship between God and the poor. Yahweh is the God who breaks into human history to liberate the oppressed. God intervened in human history to free the oppressed and establish justice on earth. This is the purpose of God's interventions

in human history. To know God is, therefore, to do justice to the oppressed and the poor.

From socio-political hermeneutics of the Bible, sin is incarnated in the unjust economico-political structures and in the ideology which sustains them. Sin has become structured in the unjust and dehumanized social system whose essential expression is the oppressive law. However, sin and evil, which were later structured into a human social system, are not inherent to humankind and history. They began one day through a human work and can one day be eliminated. So there is hope to change it. As Gutierrez sees it:

Other religions think in terms of cosmos and nature; Christianity, rooted in Biblical sources, thinks in terms of history. And in this history, injustice and oppression, divisions and confrontations exist. But the hope of liberation is also present.<sup>41</sup>

The socio-political hermeneutics of the Bible demands “praxis” to the point of being identified with the poor and the oppressed in their struggle to establish justice, or the kingdom of God, in society. Liberation theologians agree with Karl Marx that “The philosophers have only interpreted the world, in various ways; the point is to *change* it”.<sup>42</sup> The future of history belongs to the poor and the exploited, and true liberation lies in the praxis of solidarity with the oppressed.

#### **D. Human Rights from the Third World Perspective**

When the Carter administration (1977-81) in the United States made human rights<sup>43</sup> the center of its foreign policy—particularly with regard to the Third World, Juan Luis Segundo, a liberation theologian from Uruguay, asserted that the root of human rights violations was to be found in the impossible conditions laid on Third World countries by the rich countries—conditions which could only be maintained by repression. Hence, it was hypocritical for the First World, especially the U.S. administration, to criticize the Third World regimes that carried out the repression.<sup>44</sup>

Latin American theologians insisted that one should not simply speak of “human rights” in general but of the “rights of the majorities” or the “rights of the poor” whose rights were constantly being violated by the oppressive social, economic, and political structures. They pointed to

the need to develop an alternative language, because they saw in liberal Western discourse about human rights “idealist” language. Instead of simply accepting the Western notion of human rights, with its focus on individual rights, which could easily become an ideology masking the daily suffering and death of the poor majority, Latin Americans should develop a new language about human rights. They insisted that the most basic human right is the right to life and consequently the right to the means of sustaining life, that is, land and employment. Liberation theologians insisted on the “rights of peoples” and pointed to the “Universal Declaration of the Rights of Peoples” made in Algeria in 1976. This declaration stressed the rights of peoples to self-determination, to their natural resources, to the common patrimony of humankind, to a just compensation for their labor, to choose their own economic and social systems, and to speak their own language. The 1948 United Nations Universal Declaration of Human Rights also include economic and social rights.<sup>45</sup> Third World representatives regard the Western conception of human rights as narrowly individualistic since it ignores or downplays the most basic right—the right to survival and life, which is essentially connected to the right to work. Latin American theologians have sought to move the human rights issue beyond denouncing abuses, like torture, abduction, and murder to question the very development model that provides small elites with luxurious lives while the majority live in dehumanizing conditions.

Liberation theologians are intellectuals. They produce books and articles and take part in conferences. They differ from traditional theology and academics in having a connection to grass-roots base communities and popular movements. In Antonio Gramsci’s terms, they are “organic intellectuals”—intellectuals whose work is directly connected with popular struggle. As Phillip Berryman has pointed out, liberation theology is both theory-for-praxis (it has input to grass-roots movement in the form of theory and methods) and theory-of-praxis (its questions and insights come from involvement with the poor).<sup>46</sup>

#### **IV. DEPENDENCY THEORY**

Liberation theologians have challenged the Western idea of “development” by their well-known dependency theory. That theory, though disputed by many economists, is as follows: underdevelopment in the Third World is structural and was caused by the development of the First

World. First World countries, especially the United States of America, Japan and Western Europe, economically dominate and exploit Third World countries around the world under transnational capitalist neocolonialism. The rich nations exploit the poor nations by making their whole economy a dependency economy, and also exploit them in terms of their natural resources and particularly their poorly paid labor. This is the unequal relationship between the First World and the Third World. In other words, the First World nations develop or progress at the expense of the Third World nations. The story of bananas in Latin America may serve to illustrate this point.

### **A. The Story of Bananas: Honduras, Panama, Costa Rica and Guatemala**

In March 1974, several banana-producing countries in Central America joined together to demand a one-dollar tax on every case of bananas exported. Banana prices for producer countries had not increased for the previous twenty years despite high inflation. But the costs for manufactured goods imported from the industrialized countries had constantly increased. As a result the real income of banana-exporting countries had declined by 60 percent. For countries like Honduras and Panama, at least half of their export income came from bananas.

The American banana companies constantly refused to pay the newly demanded export tax. Since three large companies (United Brands, Castle and Cooke, and Del Monte) controlled 90 percent of the marketing and distribution of bananas, they had strong bargaining power. In Panama the banana companies suddenly stopped cutting bananas. In Honduras the fruit company allowed 145,000 crates of bananas to rot at the docks. Finally, Costa Rica settled the export tax issue with the banana companies for twenty-five cents a case; Panama, for thirty-five cents; Honduras, with bribes paid to high-ranking officials by companies, eventually agreed to a thirty-cent tax.

A U.N. fact-finding commission in 1975 concluded, “The banana-producing countries with very much less income are subsidizing the consumption of the fruit, and consequently the development of the more industrialized countries”.<sup>47</sup> The masses of poor people usually have little power. Military dictators, which represent wealthy elites, ruled many Latin American countries for much of the last thirty years. In Latin America and elsewhere change is difficult because the U.S. and other First World

companies work closely with wealthy local elites to protect their mutual economic interests.

The whole country of Guatemala was once virtually a dependency of the United Fruit Company (the former name of United Brands). In the 1950s, the company held two-thirds of the usable farmland and monopolized the nation's railroads in its banana business. In 1954 a democratically elected president, Jacobo Arbenz, initiated a modest program of agricultural and land reform so that poor farmers could have their own land. Feeling threatened by the reform program for their unused land, United Fruit lobbied the Eisenhower Administration to intervene. The CIA stepped in and overthrew the Guatemala leader, and established a dictatorial regime.<sup>48</sup> The U.S. secretary of state in 1954 was John Foster Dulles. His law firm had written the banana company's agreements with Guatemala in 1930 and 1936. The CIA director was Allen Dulles, brother of the secretary of state and previous president of United Fruit. The assistant secretary of state was also a major shareholder in United Fruit.<sup>49</sup>

Under the U.S.-backed military dictatorship, the political oppression in Guatemala was well-known. On September 1, 1982, CBS News correspondent Ed Rabel reported:

Human rights organizations have repeatedly accused Guatemalan governments of running deliberate programs of political murder to maintain a grip on power...priests, nuns, labor leaders, teachers, students-anyone who threatened the established order. Politicians have always been high on the hit list...a [Christian Democrat] politician here in this country told me...that more than 120 of his party's leaders had been assassinated in about an 18-month period.<sup>50</sup>

Latin American theologians suggested that under this unequal relationship between the Third and the First World, the proper terms for their relationship were not "advanced" and "backward", or "developed" and "underdeveloped", but rather "dominant" and "dependent". The poor countries have been dominated economically and politically by the rich countries. It is extremely difficult for the dominated countries to develop under these economic and political structures of dependency. Their only hope, according to liberation theology, was to break this chain of dependency.



As Gutierrez has pointed out, only a class analysis will enable us to see what is really involved in the opposition between the oppressed and dominant peoples. To understand only the confrontation between countries misrepresents the real phenomena and misleads people because such an approach is rather individualistic than structural. In Gutierrez's terms, the theory of dependency will take the wrong path and lead to deception if the analysis is not put within the framework of the worldwide class struggle. The story of beef in El Salvador may provide a clear picture of this global exploitation and class struggle.

## **B. The Story of Beef: El Salvador**

In the 1950s, almost all beef slaughtered in Central America was eaten locally. In 1957 the U.S. Department of Agriculture (USDA) approved building the first beef packing plant in Central America, and by the late 1970s three-fourths of Central America's beef was exported. By 1978, Central America provided the U.S. with 250 million pounds of beef a year. The U.S.-backed development programs built roads, and provided credit to facilitate the expansion of beef exports. From 1960-1980 over one-half of all the loans made by the World Bank and the Inter-American Development Bank for agriculture and rural development in Central America went to promote the production of beef for exports.

Wealthy elites made great profits. But large numbers of poor farmers growing basic foodstuffs were uprooted from their land because agribusiness corporations demanded more and more land to raise beef for export. In El Salvador, before the first beef packing plant was opened, 29 percent of rural households were landless. By 1980, one-half of all El Salvador's beef went to the U.S., and 65 percent of the rural households were landless. The poor farmers protested, but the agribusiness corporations succeeded in accusing the peasant activists of being communists. The national security forces trained by the U.S. repressed peasant protesters by using repressive tactics including torture and murder. Ronald J. Sider has written that:

the poor suffered to produce cheap hamburgers for American consumers. Since the 1960s, beef consumption within Central America has declined 20 percent. The poor cannot compete with us. A study by the Pan American Health Organization showed that between 1969 and 1975 mal-

nutrition rose by 67 percent among children five years and under. In fact, 50 percent of the children in Central America were dying before the age of six—largely because of malnutrition and related diseases. You don't need communists to tell you that is a bad deal.<sup>51</sup>

To characterize Latin America as a dominated and oppressed continent naturally leads one to speak of liberation and to participate in the process. Liberation is, in fact, a term which expresses a new response to the Latin American situation. The poor countries in Latin America are becoming ever more clearly aware that their underdevelopment is only the by-product of the development of Northern American countries—particularly the United States—because of the kind of unequal relationship that exists between rich and poor countries. Moreover, they are realizing that their true development will come into existence only with a struggle to break the domination of the rich countries. The story of the Border Industrialization Program in Mexico illustrates the domination of the United States over the Mexican economy.

### **C. The Border Industrialization Program: Mexico**

From 1942 to 1964 the Bracero Program attracted the flow of *braceros* (contracted migrant workers) into the United States. When the program was stopped, 200,000 farm workers were suddenly jobless. The unemployment rate reached 50 percent among the manual laborers in border cities like Mexicali and Ciudad Juarez. U.S. investors proposed the creation of a free trade zone on the U.S.-Mexican border. The proposal suggested that U.S. industries would benefit because of their need for cheap labor and Mexico would benefit from the transfer of technology and skills and solving its unemployment problem. So the Border Industrialization Program (BIP) was established in 1965 with the *maquiladora* system of twin plants, one on either side of the border.

The Mexican government granted unprecedented financial incentives to American companies: factories could be 100 percent foreign-owned and managed; low taxes on profits and sales were offered, with some Mexican states giving full tax exemption; and land could be purchased or leased on favorable terms. American corporations were practically given full discretionary power to conduct business and labor affairs without government interference. The Mexican government had consid-

ered BIP a temporary response to the border unemployment crisis. But in 1972, BIP was expanded from the original 12.5 miles south of the border to include all of Mexico, opening up the entire country to a new form of colonization of the Mexican labor force.

Rather than solving the massive unemployment problem among male workers in the border area, the program aimed at a new source of cheap factory labor. Corporations drew huge numbers of women into the industries. By 1974, there were about 500 maquiladoras operating along the border. They employed some 80,000 people, 85 percent of whom were women, with the majority between 16 and 25 years old. Those women came to the border free trade zone from small towns and cities. Mexican women were paid less than men because of their sexist disadvantaged position in society and because their wages were considered only supplementary to male sources of family income. Maquiladora workers work on average 48 hours a week for the minimum wage of 445 pesos a day—about 77 U.S. cents an hour. With the recent devaluations of the Mexican peso, the real wages of Mexican workers have dropped sharply.

The National Bank of Mexico predicted that the maquiladora workforce will reach over half a million in the 1990s. Companies frequently require women to sign temporary work contracts to avoid paying increased salaries that go with seniority. They often require a medical certificate indicating that a job applicant is not pregnant, eliminating any expenses for maternity benefits. In their book *Women in the Global Factory*, Annette Fuentes and Barbara Ehrenreich have described the working and health conditions of these Mexican workers:

Workers in electronics plants, which account for 60 percent of the maquiladoras, are regularly exposed to toxic chemicals... in garment factories, which comprise 30 percent of all border industry, chronic back problems, asthma, conjunctivitis, bronchitis and brown-lung are common occupational diseases. With the intense pressure of assembly work, maquila women experience high levels of gastrointestinal disorders, insomnia and menstrual irregularities. Bladder problems are common because women cannot use the toilets or drink water freely.<sup>52</sup>

BIP is generally recognized as a failure in terms of the Mexican government's initial expectations. Male unemployment along the border

has reached 67 percent; the transfer of skills to the workforce and technology to Mexican industry has been minimal; the capital-intensive technology remains in the U.S. What began as a short-term remedy for Mexico's unemployment crisis has only deepened dependency on the U.S. and generated new problems for the Mexican people.

Under the North American Free Trade Agreement (NAFTA), which includes the United States, Canada and Mexico, Mexican immigration to the United States, according to NAFTA proponents, will decrease as trade liberalization strengthens Mexico's economy, and consequently, its capacity to create jobs and improve wages. But NAFTA opponents maintain quite the opposite. They argue that open trade will further uproot poor Mexican farmers and put out of business small and medium Mexican enterprises unable to compete with U.S. corporations. As a result, millions of Mexicans will lose their jobs and many of them will be forced to immigrate to the U.S.

According to Primitivo Rodriguez, who heads the Mexico-U.S. Border Program and American Friends Service Committee, Mexico is losing to the United States every year more than 300,000 of her most productive and entrepreneurial women and men, including large numbers of educated, skilled and professional people. They are valuable human resources that Mexico has invested in and the country desperately needs them for achieving sound development. Behind Mexico's huge immigration is a dramatic capital drain. For the last decade, Mexico has sent abroad—mostly to the United States—an average of a billion dollars a year in debt-related payments. It is also estimated that Mexican capital flight from 1978-1988 was about \$70 billion, while Mexico's trade deficit with the United States for 1991 and 1992 reaches \$34.5 billion.<sup>53</sup>

The income gap between the rich and poor in Mexico has grown wider. The 1980 World Development Report states that:

In Mexico, where the average per capita income grew in real terms by 2.7 percent a year between 1960 and 1978, the richest 20 percent managed to edge their share of income up from 56.5 percent to 57.7 percent. Meanwhile, the poor got a smaller share. In 1968 the bottom 40 percent got 12.2 percent of the income pie; by 1977 it was below 10 percent. The poorest 20 percent saw their share cut from 3.6 percent to below 3 percent. This is not to say that the poor actually had lower incomes. Figures show

that the *per capita* income of the poorest 20 percent of the people stayed about the same, rising from \$183 to about \$187 per year. The wealthy 20 percent, on the other hand, saw their incomes rise from \$2,867 to \$3,722. Thus the average poor person saw his or her meager income rise by \$4 over a period of eighteen years, while the average rich person added \$850 in the same period.<sup>54</sup>

There was great optimism in Latin America in the 1950s regarding the possibility of achieving self-sustained economic development. This would be achieved by means of the substitution of imports, expansion of the internal market, and full industrialization, leading to an independent society. To develop, then, meant to follow the model designed by the advanced countries. In achieving this goal, the social, political, and cultural structures in the “traditional societies” or “transitional societies” of the underdeveloped countries needed to be transformed. A change of attitude, however, occurred in the 1960s. The revealing economic, social, and political realities in Latin America have made the ideology of developmentalism obsolete.

Developmentalism—the concept of economic and modernizing development—among poor nations has been largely promoted by international organizations which are in turn controlled by the First World countries. The rich countries, with their multinational corporations, and their clients of the privileged groups in the poor countries share their mutual economic benefits. Hence this global situation is structural. It results in the widening income gap between wealthy nations and poor nations, and between the status quo and the vast majority of poor people in those underdeveloped countries. The story of coffee in Brazil illustrates this point.

#### **D. The Story of Coffee: Brazil**

Under the unequal terms of trade, rich countries usually threaten new tariff barriers on certain manufactures exported by poor countries. To avoid blame from the international community for imposing tariffs, rich countries ask poor countries to “voluntarily” limit the volume of their exports. “Voluntary” quotas can have a devastating impact as was experienced by Brazil in her coffee industries.

Coffee used to provide Brazil with approximately one-half its to-

tal export revenues. Brazil's coffee exports increased 90 percent between 1953 and 1961, but the total revenue earned from coffee dropped by 35 percent. So in 1966 Brazil decided to process its own coffee in order to create more jobs and earn more income for its people. But when Brazilian coffee captured 14 percent of the U.S. market, the U.S. coffee manufacturers (Tenco, General Foods, Standard Brands, and others) charged the Brazilians with unfair competition. The U.S. government then threatened to cut off aid to Brazil, warning that it might not renew the International Coffee Agreement (which until recently kept coffee prices somewhat stable). Brazil eventually was forced to tax its instant coffee exports, and its coffee industry was seriously damaged.<sup>55</sup>

From 1968 to 1974, Brazil's economy grew at the rate of 10 percent per year, then dropped to 9 percent per year through 1980. From 1980 through 1987, Brazil's economic growth dropped sharply to only 3.3 percent per year. Brazil's minister of finance admitted in 1972 that only the top 5 percent of the Brazilian people had benefited from Brazil's economic growth. By 1970 the richest 1 percent of the population controlled a greater share of the national income (17 percent) than the bottom half (13.7 percent).<sup>56</sup> The Brazilian government did not challenge a 1974 study that showed that the real income of the poorest two-thirds of the people had declined by more than one-half in the preceding ten years.<sup>57</sup> Ronald Sider has reported that:

In 1989, two-thirds of Brazilian families tried to survive on less than \$500 a month. In 1975, 58 percent of the Brazilian children under the age of eighteen were malnourished. In 1980, 40 percent of the total population suffered from malnutrition. Today, two-thirds of the total population of 141 million people lack the minimum daily calories. More than 40 percent of the children under five years of age still suffer from malnutrition. During the years 1980-87, 13 percent of all children from 0-4 years old were moderately or severely underweight, and 31 percent of all children between the ages of 2 and 5 suffered from moderate and severe stunting—the result of malnutrition.<sup>58</sup>

According to Gutierrez, there are three concepts of development. In the first, development can be regarded as purely economic. In this sense it would be the same as economic growth. In the second, develop-

ment is seen as a total social process, including economic, political, social, and cultural aspects. This view stresses the interdependence of these different factors. In the third, development is seen as liberation from structural domination. It concerns human values: human beings should have control over their own destiny. Liberation theology adheres to the third meaning of development, as “liberation”. This approach places the concept of development in a wider context—a history in which humankind takes control of his or her own destiny.<sup>59</sup>

There are two root causes, according to Gutierrez, of the social, economic, political, and cultural problems among the poor nations. First, the dependence of some countries on others: poor countries depend upon rich countries for their “development”. Second, the domination of some social classes over others: the privileged or elite class dominate the majority which are the oppressed people in their own countries.

The attempts to change the situation within the existing system have proven to be failures. The ruling classes use their legal violence, under the name of “law and order”, against the struggles for justice of poor people. Even though most of the struggles of the poor and the oppressed are just for their basic necessities of life—food, shelter, medicine, education—the movements are violently suppressed by the government. Gutierrez has pointed out that:

Development must attack the root causes of the problems and among them the deepest is economic, social, political and cultural dependence of some countries upon others—an expression of the domination of some social classes over others... This analysis of the situation is at the level of scientific rationality. Only a radical break from the status quo, that is, a profound transformation of the private property system, access to power of the exploited class, and a social revolution that would break this dependence would allow for the change to a new society.<sup>60</sup>

The story of the international debt crisis may serve to illustrate the domination of the rich capitalists, through the channels of the international banking system, over the poor countries causing their economic crisis.



## **E. The International Debt Crisis: Latin America and Beyond**

The debt crisis began with the fourfold increase in the world's oil prices in 1973-1974 causing a rapid increase in borrowing by underdeveloped countries. Western commercial banks overflowing with money deposited by oil-producing nations made huge loans to Third World governments. With the leap in oil prices, Third World countries needed to borrow huge amount of money to continue their economic growth. In the late 1970s, Citicorp chairman Walter Wriston spoke about the loans taking the optimistic view that "countries never go bankrupt".

Many of the loans were, unfortunately, spent on expensive armaments or wasted due to official corruption. Faced with budget deficits, most Third World governments chose to cut education and health programs rather than their military budgets. The wealthy elites who controlled power transferred their accumulated wealth, amid their country's poverty, to Western commercial banks for reasons of their own financial security and to earn higher interest payments. In 1981 and 1982, while the fifteen largest debtor nations received \$81 billion in new loans, the wealthy elites moved \$51 billion out of those same countries into Swiss bank accounts, U.S. real estate, or other places.<sup>61</sup>

Since the interest rates for the loans were variable rather than fixed, the higher interest rates (partly caused by the U.S.'s huge budget deficit) greatly increased the interest payments on the poor countries. Short-term loans that debtor nations received in the mid-1970s at an interest rate of 6.5 percent cost as much as 19 percent when renewed in 1980 and 1981. Meanwhile, the prices of their exports, which were basically agricultural products and raw materials, fell approximately 40 percent relative to the prices paid for industrial goods they imported. Poor debtor countries now faced widening balance-of-payment deficits as well as trouble paying their debts.

To make higher profits during the high-interest-rate years, Western commercial banks continued to lend huge sums of money to the Third World from 1979 to 1981. In fact, during those two years of high interest rates, commercial banks lent as much to major debtor countries as during the entire period from 1973 to 1979. Poor debtor countries now found themselves meeting payments for old debts with newly borrowed money, at much higher interest rates. As a result, their debts piled up even higher, and by the early 1980s they faced severe difficulties in paying even the interest on the debts.

In August 1982, the Mexican government announced that it could no longer pay the interest on its \$58 billion foreign debt. Shortly afterwards, Venezuela, Brazil, Argentina, and the Philippines made the same announcement. The debtor countries were increasingly forced to finance both their old debts and their economic growth out of their export earnings. Furthermore, debtor countries were returning \$11.3 billion more to Western commercial banks than they received in new loans. When paybacks to the IMF and World Bank were included, the net flow of money (new lending minus payments for debts) for all indebted countries went from a positive \$35.2 billion in 1981 to a negative \$30.7 billion in 1986.<sup>62</sup> This negative transfer of funds, according to the World Bank's annual report, reached \$50.1 billion in 1989.

The net flow of foreign exchange from the underdeveloped to the developed countries has caused serious problems for domestic investment in poor nations. The result is the stagnation of Third World development. But development is crucial to the creation of the new wealth necessary to pay off the debt. So the debt crisis has trapped many poor countries, especially in Africa and Latin America, in a serious economic crisis, and put off their development prospects.

One study estimates that nearly 85 percent of the total increase in the foreign debt of the non-oil-producing countries between 1973 and 1982 resulted from four causes about which they could do nothing: OPEC oil price increases, the rise in dollar interest rates in 1981-1982, the reduction of Third World exports because of worldwide recession, and the abrupt drop in the prices of agricultural products and raw materials exported by Third World countries.<sup>63</sup> Ronald Sider reports that:

The debt crisis has contributed to the worst economic crisis in Latin American histories [sic]. Between 1981 and 1988 real per capita income declined in absolute terms in almost every country in South America. In many countries, such as Argentina and Peru, the drop in national income was greater than 20 percent. Living standards in many countries have fallen to levels of the 1950s and 1960s. Unprecedented inflation has raged in Brazil (934 percent in 1988), Argentina, and Peru (annual inflation in both reached several thousand percent in 1988). The region is rife with political instability. Democratic governments are damaged. In February 1989, Venezuelans rioted in Caracas

and other cities in protest against austerity measures prompted by Venezuela's debt crisis. Three hundred people died.<sup>64</sup>

Faced with the debt crisis, debtor governments drastically cut spending on human services like education, health care, and food subsidies. This resulted in severe increases in malnutrition and illness in poor nations with large foreign debts, as seen in the case of Bolivia and other Latin American countries which have followed the measurement posed by the International Monetary Fund (IMF).

## **F. The IMF Measurement and Its Result: Bolivia and Others**

Bolivia has been hailed by Western banks and governments for its new economic program and fiscal discipline in recent years. The health of the Bolivian people has received less attention. A UNICEF official in Bolivia estimated that half of the children born in Bolivia die before they reach age one. In 1986, in compliance with an IMF stabilization program, Bolivia cut its health budget by 67 percent—at a time when 67 percent of Bolivia's people suffered from malnutrition.<sup>65</sup>

Third World debt payments have also deprived children of basic education. According to a UNICEF survey, in twenty-one out of thirty-three poor debtor countries, spending per primary school pupil fell, often sharply, in the first half of the 1980s. Bolivia suffered a rise in school desertation from 2.2 to 8.5 percent among primary school-age children between 1980 and 1983. Similar drop-out rates are found in Barbados and Mexico. The director general of UNESCO, Federico Mayor, has warned that, "If debt repayment is to take precedence over the necessary investment in the social sectors including education, then [we will suffer] a dangerous erosion of human resources that...might set back the countries of the South by a whole generation or more".<sup>66</sup>

A World Bank study found that in Sao Paulo, Brazil, real wages of unskilled construction workers fell by over 25 percent between 1980 and 1985. Between 1983 and 1985, the minimum wage in Brazil fell to only one-fifth to one-seventh the amount necessary to cover a family's basic needs. From 1976 to 1985, workers in Bolivia suffered a 36 percent reduction in purchasing power. In early 1987, the Bolivia workers' union (COB) fought for a monthly minimum wage of \$40, which was barely enough for food for a family of four. The government, however, would

only agree to \$25.67

The July 1986 issue of World Bank News noted that in Chile, the real minimum wage in 1985 had dropped below the 1981 level. The government of Mexico between 1982 and 1986 reduced its budget deficit, suggested by the IMF, as part of the effort to improve the economy. As a result, unemployment in Mexico rose from 4.7 percent in 1982 to 17.6 percent in 1987. Real wages in Mexico declined about 50 percent between 1980 and 1988. Increasing numbers of poor people, particularly poor children, died of starvation or malnutrition-related diseases.<sup>68</sup>

The international debt problem is not really a banking crisis, Ronald Sider has pointed out, but rather a development crisis. Huge debt payments not only reduce a government's spending on people's health care and education. They also prevent the capital investment that could provide new jobs and new income in the future. Poor debtor economies will continue to decline, essential human services will be cut even more, and millions of people will suffer even greater poverty.

Under these circumstances, the governments of the rich nations and the oppressive governments of the poor nations create the image of being religious or righteous. Traditional religious institutions legitimize oppressive governments by interpreting the religion in a way that sides with the establishment, or simply by being silent or ignoring the social reality and dealing only with metaphysical and ontological aspects of religion. These kinds of religious interpretations serve an ideological function to sustain the status quo and the oppressive structure. Hugo Assmann had examined the military's utilization of Christian symbols to justify itself. He concluded that it is possible, in concrete praxis with the people, to "repack" religious symbols so that they will aid in dynamizing a "church born of the people".<sup>69</sup>

To characterize the situation of poor countries as dominated and oppressed leads one to speak of economic, social, and political liberation. Ideas and theories must be reconsidered in the light of praxis or in the real struggle for justice in solidarity with the poor and the oppressed. This liberation requires not only better living conditions, but a radical change in the political, economic and social structures for a new way to be a human being. Unfortunately, this structural change has oftentimes been faced with the counterrevolutionary effort from the First World metropolitan center, particularly the United States. The case of Nicaragua clearly illustrates this point:

## **G. First World Counterrevolutionary Effort: Nicaragua**

In 1981 Ronald Reagan authorized secret CIA military support for right-wing guerrillas attacking the new socialist government of Nicaragua. The alleged official statement was to stop arms shipments from the Soviet Union and Cuba through Nicaragua to the guerrillas in El Salvador. Later, however, when the contra guerrillas had an army of over ten thousand soldiers and the U.S. could not offer evidence of any substantial arms shipment to El Salvador, the Reagan administration admitted that it had intended to overthrow the Sandinista government. The result has been enormous suffering and massacre in Nicaragua. In its brief to the World Court, Nicaragua claimed that contra violence had killed 2,600 persons; maimed, raped or kidnapped 5,500; and displaced 150,000 civilians.<sup>70</sup>

Nicaragua under the Sandinista government had internally retained a market economy, 60 percent of which was in private hands. The Sandinista government, according to Phillip Berryman, had followed the economic strategy of the “structuralist” school of Latin American economics, led by economists such as Prebisch, rather than a Marxist economic program. The Sandinista government sought to impose what it called the “logic of the majority” on an economy that operated primarily through market mechanisms.<sup>71</sup> However, to end the bloodshed caused by the war with the contra guerrillas, the Sandinista government agreed to hold a general election and finally gave way to the government of Violeta Chamorro which has turned Nicaragua back to the capitalist road once again.

## **H. First World Critique of Liberation Theology**

Michael Novak, an American theologian, and his associates represent a First World critique of liberation theology. In *Will It Liberate?*, Novak challenges the Marxist conception of history as class struggle. Instead he maintains that the chief interpretative key to history is liberty and justice for all. To quote Novak:

It (Marxism) carries within it a self-contradictory principle. On the one hand, it says that history is class struggle. On the other hand, it says that justice ought to prevail. But if the last is true, then the main interpretive key to

history is not oppression but justice, not struggle but reconciliation.<sup>72</sup>

He then presents his view of human nature thus:

The first step of Christian self-identification, therefore, is not solely, “I am oppressed”, but, rather, “I am also essentially (never completely) free and in love with justice”. Inherently free and in love with justice, I need bend my knee to no one, may stand erect and proud. I am not merely a victim. I am not merely oppressed. Within me I carry the seeds of liberty and justice, and the vision of a world that mirrors these in all its institutions, a world (eventually) of reconciliation in mutual liberty and mutual justice.<sup>73</sup>

Here Novak’s argument avoids social reality by entering into the realm of metaphysics. He would tell the oppressed and the poor in Latin America that metaphysically they are as free as the oppressors and the elites, so even though their living and working conditions are oppressive, they should still be proud of their own human nature because ultimately all human nature is essentially free regardless of social class. This kind of metaphysical explanation simply conceals social oppression and confuses the poor and the oppressed in order to keep them in their disadvantageous social status.

Until 1850, Latin America and Anglo America had comparable per capita incomes. Novak argued that the prosperity of the advanced capitalist countries is due to their own innovation and productivity since the beginning of the industrial revolution in the middle of the eighteenth century. Latin Americans, however, have fallen far behind the North because they do not value the same moral qualities North Americans do.<sup>74</sup> Novak’s approach is overly individualistic: failure or success is primarily due to personal “moral quality”. His individualistic view inevitably leads to ethnocentrism. He also fails to see the oppressive forces behind the unjust economic and power structures that constitute the relationship between the First World and the Third World, and between the Third World’s ruling elites and the vast majority of poor people.

One thing Novak might be right about in his critique of liberation theology is that most liberation theologians lack a clear idea of what kind of socialism they are seeking. According to Novak, one must consult

socialist experiments in North Korea, Vietnam, Tanzania, Ethiopia, Hungary, Romania, and elsewhere. He argues:

Many who claim to desire socialism actually desire not a particular set of economic institutions, but “a new man”. They want a society characterized by caring, generosity, compassion and unselfishness. To some extent, they naively combine the picture of a society in which citizens are saintly Christians with a picture of socialist economic institutions... The trouble with socialism is that it lacks checks and balances. It does not restrain selfishness. It channels selfishness into the quest for military and bureaucratic power.<sup>75</sup>

Novak misunderstands the dynamic and critical properties of liberation theology: liberation theology represents a struggle of the poor and the oppressed out of their misery under the existing oppressive structures; liberation theologians are struggling for a model of society which learns from the mistakes of Western capitalism and Eastern Stalinism and which serves the reality of their own Latin America.

Joseph Ramos, an economist and an associate of Novak, has calculated that in Latin America, the bottom 40 percent could be brought above the “poverty line” (less than \$200 a year annual income) by an expenditure of \$16 billion a year. That amount would be equivalent to 5 percent of the GNP or 22 percent of government spending (in the late 1970s).<sup>76</sup> But Ramos has failed to see the skewed power structure between the wealthy elites and the poor, which determines the distribution of income. A serious redistribution of income inevitably supposes a redistribution of power, which is what most Third World people have been struggling for. The redistribution of power would bring about a fairer distribution of wealth. Cuba may serve as an example for a fairer distribution of income in Latin America.

Cuba has eliminated the dire poverty that existed prior to the revolution. The whole population of Cuba has an adequate diet, is able to work, and has access to medical care and schooling. That is true in no other Latin American country. On the “physical quality of life” index (a composite of infant mortality, life expectancy, and literacy) Cuba scores 84 as opposed to the Latin American average of 71 and the industrialized Western countries’ average of over 90. The only Latin American country



to surpass Cuba is Argentina (85), which has twice Cuba's per capita income. Similarly, although Brazil's average per capita income (\$702) is higher than Cuba's (\$598), the bottom 80 percent of Cuban society have a higher income.<sup>77</sup>

Dependency theory tells much about the future of Latin American economies. According to Phillip Berryman, Latin America is in its worst economic crisis since the 1930s. The foreign debt (\$360 billion in the late 1980s) comprises 40 percent of the continent's exports. In some countries like Peru, living standards have fallen back to the levels of twenty years ago. Latin America produces less food per capita than it did forty years ago.<sup>78</sup> This situation reinforces the basic ideas of dependency theory that poverty in Latin American countries is structural and the only way to cure the situation is basic structural change. And this change, according to Gutierrez, is also a process of human emancipation in history:

The liberation of our continent means more than overcoming economic, social, and political dependence. It means, in a deeper sense, to see the becoming of mankind as a process of the emancipation of man in history. It is to see man in search of a qualitatively different society in which he will be free from all servitude, in which he will be the artisan of his own destiny. It is to seek the building up of a *new man*.<sup>79</sup>

People who engage in this process of human emancipation in history need to be aware of and respond to the global market economic structure as well as to reflect the social and cultural reality of their own countries. Since the situation is global and capitalism today is beyond national boundaries, solidarity among people in both the Third World and the First World is necessary in the struggle to emancipate people from the domination of monopoly capitalism.

The fall of Marxist-Leninist ideology in Eastern Europe and the disintegration of the Soviet Union in 1991 posed a great challenge to the ideas of socialism which liberation theology has been nurturing. The lessons from Eastern Europe and the former Soviet Union would help liberation theologians face their own Latin American situation with a new sense of reality. And this new awareness would add a new dimension to its dependency theory. Above all, liberation theology is not purely Marxism. It is rather a form of Christianity with Marxist social analysis. Lib-

eration theology tends to utilize Christianity, Marxism, and even some aspects of Capitalism (as in the case of socialist market economy of the Sandinista government of Nicaragua) for the ultimate purpose of the overall well-being of the Latin American people and of all human beings at large.

## **V. SALVATION WITHIN HISTORY**

Doctrinally the Christian church interpreted “salvation” as eternal life after death. This traditional metaphysical view was conjoined with an ethics of charity to alienate social problems. This is a more individualistic approach to salvation. In a more modern interpretation, salvation means “authentic existence” or the self-cultivation of an individual. Both traditional and modern views of salvation, then, have less to do with the structure of human community, society, and history. Both can be seen as a form of salvation from history. Liberation theology has criticized salvation so understood.

For liberation theology, salvation primarily includes liberation from political and economic oppression. In other words, salvation is freedom from social sin. It is necessarily socio-political, though not only socio-political. This socio-political salvation is virtually equivalent to liberation within history. Liberation theologians have wrestled with the tension between the traditional church view of salvation from history and their own concern for liberation within history. Yet the tension remains: liberation theologians are not fully satisfied with only social liberation, they seek to include personal salvation as well. For many liberation theologians, salvation means social liberation as well as personal salvation, the combination of which is the fullness of human life within history. In other words, they seek to overcome personal sin as well as social sin. This view could be called salvation within history. I will discuss liberation theology’s concepts of sin and of salvation within history by referring to the works of Gustavo Gutierrez and Leonardo Boff.

### **A. Social Sin and Personal Sin**

According to Gutierrez, sin is a human, social, and historical reality. On the one hand, sin is regarded as the absence of brotherhood and love in the relationships with other human beings and with God. In this sense, sin is an interior fracture. On the other hand, sin is evident in op-

pressive structures, in the exploitation of human beings by human beings, in the domination and slavery of peoples, races, and social classes. Sin appears as the fundamental alienation—the root of a situation of injustice and exploitation. Unfair wages, exploitation, and starvation are clear indications of sin and evil. Sin demands a radical liberation, which in turn necessarily implies a political liberation. Gutierrez argues:

The prophets announce a kingdom of peace. But peace presupposes the establishment of justice... It presupposes the defense of the rights of the poor, punishment of the oppressors, a life free from the fear of being enslaved by others, the liberation of the oppressed. Peace, justice, love, and freedom are not private realities; they are not only internal attitudes. They are social realities, implying a historical liberation.<sup>80</sup>

Sin, according to Gutierrez, is both a personal and a social historical reality. It is a part of the daily events of human life, and it is an obstacle to life's reaching the fullness called salvation. The grace-sin conflict is necessarily and inevitably historical, temporal, earthly, social, and material. The Medellin Conference refers to the situation in Latin America as a "sinful situation", as a "rejection of the Lord".<sup>81</sup>

## **B. Social Liberation and Personal Salvation**

Gutierrez argues that salvation is not something otherworldly. Salvation is the communion of human beings among themselves and the communion of a human being with God. Salvation embraces every aspect of human reality: body and spirit, individual and society, person and cosmos, time and eternity. Gutierrez has characterized liberation as having two aspects: exterior and interior. He asserts that:

But modern man's aspirations include not only liberation from exterior pressures which prevent his fulfillment as a member of a certain social class, country, or society. He seeks likewise an interior liberation, in an individual and intimate dimension; he seeks liberation not only on a social plane but also on a psychological.<sup>82</sup>

Again, Gutierrez says:

The scope of liberation on the collective and historical level does not always and satisfactorily include psychological liberation. Psychological liberation includes dimensions which do not exist in or are not sufficiently integrated with collective, historical liberation.<sup>83</sup>

Gutierrez classifies the concept of salvation into three levels of liberation: The first and foremost is the political liberation of the oppressed people. He said, "In the first place, liberation expresses the aspirations of oppressed peoples and social classes, emphasizing the conflictual aspect of the economic, social, and political process which puts them at odds with wealthy nations and oppressive classes".<sup>84</sup>

The second is the liberation of people in history by participation in the creative work of God who transforms people and structures. "To conceive of history as a process of the liberation of man is to consider freedom as a historical conquest; it is to understand that the step from an abstract to a real freedom is not taken without a struggle against all the forces that oppress man, a struggle full of pitfalls, detours, and temptations to run away. The goal is not only better living conditions, a radical change of structures, a social revolution; it is much more: the continuous creation, never ending, of a new way to be a man, *a permanent cultural revolution*".<sup>85</sup>

And the third is the ultimate liberation from sin into complete communion with God. "The word liberation allows for another approach leading to the Biblical sources which inspire the presence and action of man in history. In the Bible, Christ is presented as the one who brings us liberation. Christ the Savior liberates man from sin, which is the ultimate root of all disruption of friendship and of all injustice and oppression".<sup>86</sup> Gutierrez has concluded the three levels of liberation as follows:

In dealing with the notion of liberation..., we distinguished three levels of meaning: political liberation, the liberation of man throughout history, liberation from sin and admission to communion with God... These three levels mutually affect each other, but they are not the same. One is not present without the others, but they are distinct: they are all part of a single, all-encompassing salvific process,

but they are to be found at different levels.<sup>87</sup>

These three levels of liberation are interdependent, and they merge into one history. For Gutierrez, there are not two histories, one profane and one sacred; rather there is only one human history. But this history is a conflictual one, a history of conflicts of interest, of struggles for justice, a history of exploitation of human beings, of aspirations for liberation.<sup>88</sup>

Boff agrees with Gutierrez in that salvation and liberation are distinct, but they are united. The intimate relationship between love of God and love of neighbor helps us to understand the intimate relationship between salvation and liberation. Both are not identical, but each is present in the other. They are always together and cannot be separated.

But Boff still posits a dualism between salvation and liberation. For Boff, liberation is never full and complete, it always carries a quota of oppression, whereas salvation is total liberation. Boff makes the parallel of liberation and salvation with the concepts of body and soul. Body and soul are two principles, together forming a single human individual. The principles of body and soul enable us to understand a human being in its unity-in-duality. Using this model, Boff explains that salvation and historical liberation constitute the unity-in-duality of one single history, just as body and spirit constitute the dual unity of a human being. To quote Boff:

The concrete human being is a unity-in-duality. Body and soul should not be understood as two things making up the one human being. Body and soul are two concrete principles, together forming a single thing, the human individual. Principles are not things. They are what enable us to understand things—in this case, body and soul are the principles that enable us to understand the concrete human being in its unity-in-duality.<sup>89</sup>

Although Boff himself is not so clear about the unity of salvation and liberation, his “theory of one history” (or one reality) makes a contribution to the liberation theology of Latin America. As such, his theory is a disturbance to the Catholic hierarchy in the Vatican. He interprets social oppression as social sin, and applies Christian terminology to social structures. Salvation is experienced through the process of social liberation. Solving the problems of political and economic oppression is part of salvific

process.

It seems to me that liberation theology, in its attempt to interpret the Bible in terms of concrete historical contexts, faces the tension between social liberation and personal salvation. Liberation theology has been criticizing the traditional Christian churches in their individualistic and otherworldly interpretation of salvation. Yet it cannot be satisfied with liberation within history as the total human fulfillment. Although the attempts of liberation theologians, ones like Gutierrez and Boff, to overcome the tension between salvation from history and liberation within history are not complete, their interpretations have shed some light on the perspective of human fulfillment—salvation within history. I would like to conclude this section by saying that liberation within history is the presupposition of salvation within history.

In conclusion, liberation theology in Latin America represents a Third World Christian response to the global market economy. Under monopoly capitalism, most Third World countries have been economically dominated and exploited by First World countries, through the global market economy. Liberation theology has borrowed social theory—particularly the dependency theory—from the Latin American school of social sciences to name the economic and political realities of the continent. It has also utilized Marxist social analysis, especially class struggle, to unmask oppressive social structures, both at the local and the global levels.

Although Marxism failed to offer a successful alternative economic system, witnessed in its failure in China, the former Soviet Union, and Eastern Europe, it still provides an essential tool for the analysis and understanding of the functions of capitalism today. The failure of Marxian economic systems in Asia and Europe has challenged liberation theology and its ideal of socialism. Under this new global situation, liberation theology has been forced to reflect upon itself in the context of the new reality. This, over time, may result in a new dimension to liberation theology. Liberation theology probably represents the most systematic religious revival in response to social oppression among today's world religions. And it is probably, as Marc Ellis and Otto Maduro point out, the most significant Christian theological development in the twentieth century.

## Endnotes

<sup>1</sup>Hans Koning, *Columbus: His Enterprise*, p.53.

<sup>2</sup>L. S. Stavrianos, *Global Rift*, p.76.

<sup>3</sup>M. Leon-Portilla, ed., *The Broken Spears: The Aztec Account of the Conquest of Mexico*, p.64.

<sup>4</sup>E. Bradford Burns, *Latin America: A Concise Interpretative History* (Englewood Cliffs, New Jersey, Prentice-Hall, Inc.,1972), p.14-20.

<sup>5</sup>M. Leon-Portilla, ed., *The Broken Spears: The Aztec Account of the Conquest of Mexico*, p.94.

<sup>6</sup>The arrivals of Europeans and Africans in the lands of the Native Americans contributed to the racial mixture of the population in Latin America: the *mestizo* (the cross of indigenous and white race), the *sambos* (the cross of indigenous and african race), the *mulattos* (the cross of white and black), and myriad other interracial combination.

<sup>7</sup>For more details, see L. S. Stavrianos, *Global Rift*, pp.90-98.

<sup>8</sup>For more details on the historical development of liberation theology, see Phillip Berryman, *Liberation Theology* (Bloomington, Indiana: Meyer Stone Books, 1987), pp. 9-107.

<sup>9</sup>Phillip Berryman, *Liberation Theology*, p.24.

<sup>10</sup>*Ibid.*, p.64.

<sup>11</sup>*Ibid.*, p.65.

<sup>12</sup>*Ibid.*, pp.100-101.

<sup>13</sup>See Marc H. Ellis and Otto Maduro (editors), *The Future of Liberation Theology: Essays in Honor of Gustavo Gutierrez* (Maryknoll, New York: Orbis Books, 1989).

<sup>14</sup>For more details, see Paulo Freire, *Pedagogy of the Oppressed* (New York: Continuum, 1990).

<sup>15</sup>Gustavo Gutierrez, *A Theology of Liberation*, p. 11. Emphasis in original.

<sup>16</sup>For a more complete critique of the structure of church hierarchy, see Leonardo Boff, *Church: Charism and Power: Liberation Theology and the Institutional Church*, translated by John W. Diercksmeier (New York: Crossroad, 1988).

<sup>17</sup>Gibson Winter, *Liberating Creation*, p.129.

<sup>18</sup>Gustavo Gutierrez, *A Theology of Liberation*, p. 15. Emphasis in original.

<sup>19</sup>Cited by Gustavo Gutierrez, *A Theology of Liberation*, p. 116. (See “Socioeconomic Structures of Peru”, in *Between Honesty and Hope*, p.74.)

<sup>20</sup>Gibson Winter, *Liberating Creation*, p.134.

<sup>21</sup>John C. Raines, *Modern Work and Human Meaning*, p.83. Emphasis in original.

<sup>22</sup>Gustavo Gutierrez, *A Theology of Liberation*, p.308. <sup>23</sup>Leonardo & Clodovis Boff, *Salvation and Liberation*, pp 8-9.

<sup>24</sup>See more details in Juan Luis Segundo, *The Liberation of Theology* (Maryknoll, New York: Orbis Books, 1988).

<sup>25</sup>Leonardo & Clodovis Boff, *Salvation and Liberation*, p.50.

<sup>26</sup>Roger N. Lancaster, *Thanks to God and the Revolution: Popular Religion and Class Consciousness in the New Nicaragua* (New York: Columbia University



Press, 1988), p.xx.

<sup>27</sup>Gustavo Gutierrez, *The Power of the Poor in History*, translated from the Spanish by Robert R. Barr (Maryknoll, New York, Orbis Books, 1990), p.45.

<sup>28</sup>See more details in Franz Hinkelammert, *The Ideological Weapons of Death: A Theological Critique of Capitalism*, translated from the Spanish by Phillip Berryman (Maryknoll, New York: Orbis Books, 1986).

<sup>29</sup>Gustavo Gutierrez, *The Power of the Poor in History*, p.20.

<sup>30</sup>Leonardo & Clodovis Boff, *Salvation and Liberation*, p.29. The Nova Historia da Igreja na America Latina, in thirteen volumes, is the most complete of this rereading Latin American history in the interest of liberation.

<sup>31</sup>For a more complete perspective on the philosophy of liberation, see Enrique Dussel, *Philosophy of Liberation*, translated from the Spanish by Aquilina Martinez and Christine Morkovsy (Maryknoll, New York: Orbis Books, 1985).

<sup>32</sup>Ibid., pp.8-9.

<sup>33</sup>Gustavo Gutierrez, *A Theology of Liberation*, p.300.

<sup>34</sup>Ibid., pp.193-194.

<sup>35</sup>Ibid., pp.194, 295.

<sup>36</sup>Ibid., p.195.

<sup>37</sup>Ibid., p.202.

<sup>38</sup>Ibid., p.205.

<sup>39</sup>Leonardo & Clodovis Boff, *Salvation and Liberation*, p.25.

<sup>40</sup>See more details in Jose Miranda, *Marx and the Bible: A Critique of the Philosophy of Oppression* (Maryknoll, New York: Orbis Books, 1988).

<sup>41</sup>Gustavo Gutierrez, *A Theology of Liberation*, p.174.

<sup>42</sup>Karl Marx, *Early Writings* (New York: Vintage Books, 1975), p.423. Emphasis in original.

<sup>43</sup>For the history of and philosophical basis for human rights, see Leonard Swidler (editor), *Human Rights: Christians, Marxists and Others in Dialogue* (New York: Paragon House, 1991).

<sup>44</sup>See more details in Juan Luis Segundo, *The Liberation of Theology*.

<sup>45</sup>See Phillip Berryman, *Liberation Theology*, pp.118, 112.

<sup>46</sup>Ibid., p.86.

<sup>47</sup>“Action”, *New Internationalist*, August 1975, p.32.

<sup>48</sup>Annette Fuentes and Barbara Ehrenreich, *Women in the Global Factory*, p.42.

<sup>49</sup>Ronald J. Sider, *Rich Christians in an Age of Hunger*, p.144.

<sup>50</sup>Annette Fuentes and Barbara Ehrenreich, *Women in the Global Factory*, p.43.

<sup>51</sup>Ronald J. Sider, *Rich Christians in an Age of Hunger*, p.137.

<sup>52</sup>Annette Fuentes & Barbara Ehrenreich, *Women in the Global Factory*, p.31.

<sup>53</sup>Primitivo Rodriguez, “We Can Do More for Mexico than a Free-Trade Pact”, in *The Philadelphia Inquirer* (January 18, 1993), p.A11.

<sup>54</sup>Ronald J. Sider, *Rich Christians in an Age of Hunger*, pp.6-7.

<sup>55</sup>Ibid., pp.113-114.

<sup>56</sup>Phillip Berryman, *Liberation Theology*, p.123.

- <sup>57</sup>World Bank, *World Development Report 1989*, pp.164-65.
- <sup>58</sup>Ronald J. Sider, *Rich Christians in an Age of Hunger*, p.6.
- <sup>59</sup>Gustavo Gutierrez, *A Theology of Liberation*, p.25.
- <sup>60</sup>*Ibid.*, p.26.
- <sup>61</sup>Kenneth Jameson and Peter Henriot, "International Debt, Austerity and the Poor", Lee Travis, ed., *Rekindling Development: Multinational Firms and World Debt* (Notre Dame: University of Notre Dame Press, 1988), pp.15-56.
- <sup>62</sup>Todaro, *Economic Development* (1989), p.419.
- <sup>63</sup>William R. Cline, *International Debt and the Stability of the World Economy* (1983: Institute for International Economics, Washington, D.C.).
- <sup>64</sup>Ronald J. Sider, *Rich Christians in an Age of Hunger*, p.117. 65 Jameson and Henriot, "International Debt, Austerity and the Poor", Lee Travis, ed., *Rekindling Development*, pp.15-56.
- <sup>66</sup>Cited by James P. Grant, *State of the World's Children 1990* (UNESCO), pp.45, 47.
- <sup>67</sup>Ronald J. Sider, *Rich Christians in an Age of Hunger*, p.119.
- <sup>68</sup>*Ibid.*
- <sup>69</sup>See more details in Hugo Assmann, "The Faith of the Poor in Their Struggle with Idols", in Pablo Richard et al., *The Idols of Death and the God of Life: A Theology*, translated from the Spanish by Barbara E. Campbell and Bonnie Shepard (Maryknoll, New York: Orbis Books, 1983), pp.194-229.
- <sup>70</sup>Ronald J. Sider, *Rich Christians in an Age of Hunger*, p.145.
- <sup>71</sup>Phillip Berryman, *Liberation Theology*, p.93.
- <sup>72</sup>Michael Novak, *Will It Liberate? Questions about Liberation Theology* (New York, Mahwah: Paulist Press, 1986), p.109.
- <sup>73</sup>*Ibid.*, p.110.
- <sup>74</sup>See Michael Novak, *The Spirit of Democratic Capitalism* (New York: Simon & Schuster, 1982), pp.272-314.
- <sup>75</sup>Michael Novak, *Will It Liberate?*, p.114.
- <sup>76</sup>Cited by Phillip Berryman, *Liberation Theology*, p.182.
- <sup>77</sup>Phillip Berryman, *Liberation Theology*, p.184.
- <sup>78</sup>*Ibid.*, p.183.
- <sup>79</sup>Gustavo Gutierrez, *A Theology of Liberation*, p. 91. Emphasis in original.
- <sup>80</sup>*Ibid.*, p.167.
- <sup>81</sup>*Ibid.*, pp.167, 175.
- <sup>82</sup>*Ibid.*, p.30. Emphasis in original.
- <sup>83</sup>*Ibid.*, p.31.
- <sup>84</sup>*Ibid.*, p.36.
- <sup>85</sup>*Ibid.*, p.32. Emphasis in original.
- <sup>86</sup>*Ibid.*, p.37.
- <sup>87</sup>*Ibid.*, p.176.
- <sup>88</sup>Gustavo Gutierrez, *The Power of the Poor in History*, p.52.
- <sup>89</sup>Leonardo & Clodovis Boff, *Salvation and Liberation*, p.63.

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