Catholic Social Thought and Amartya Sen on Justice

By Johan Verstraeten

Abstract:

The paper suggests that Sen’s “Idea of Justice” is not only the most inspiring and reasonable response to Rawls’ “Theory of Justice” but also an important challenge for Catholic Social Thought. The paper shows that Catholic Social Thought and Sen’s Idea of Justice have much in common. It argues that despite the emphasis on individual freedom in Sen’s capability approach, the convergence between his approach and Catholic Social Thought is strong. There are several points of resemblance: the role of indignation and emotion, the implications of a realistic anthropology (“seeking institutions that promote justice rather than institutions as themselves manifestations of justice”), freedom as responsibility, human rights as rooted in our shared humanity, valuing religious wisdom in justice theory.

_If rationality were a church, it would be a rather broad church_

(Amartya Sen, The Idea of Justice)

Catholic social thought is more than a normative framework based on particular faith convictions, papal encyclicals or theology. It is also a dynamic tradition of ethical reasoning about social, political and economic issues. Both as ‘permanent learning process’ requiring analysis, and as framework of ethical reasoning, it cannot exist without a continuing conversation with the human sciences. Moreover, in order to convince non-Catholics the reasonableness of its arguments Catholic social thought can’t be limited to reiterating its own principles and doctrine. It has only impact on the common search for a more just world in as far as it is in conversation with the leading secular social philosophers of a particular time. In fact it has always done it. In the nineteenth century the encyclical _Rerum novarum_ adjusted its Thomist approach with insights from the liberal tradition (defining property as “natural” and “inalienable right”). In the post Medellin era, the official Church’ engagement with liberation theology necessitated a critical conversation on Marxism and the idea of class struggle. After Rawls (1971) _Theory of Justice_ became an

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Official Texts from the Catholic Church (reference is made for all documents to the numbers of the paragraphs and not of the pages).


Pius XI, _Quadragesimo ano_ (1931), in: Walsh, Davis, o.c.

John XXIII, _Pacem in Terris_, in: Walsh, Davis, o.c.

_Baudium et spes_, Pastoral Constitution on the Church in the Modern World, in: o.c.

Benedict XVI, _Deus caritas est_, Encyclical Letter, Vatican City, Libreria Editrice Vaticana 2005

Francis, Apostolic _Exhortation Evangelii Gaudium_, Vatican City, Libreria Editrice Vaticana, 2013

Francis, _Laudato si’_ Encyclical Letter on Care for Our Common Home, Vatican City, Libreria Editrice Vaticana, 2015

indispensable dialogue partner of Catholic experts in social ethics, allowing them, despite fundamental differences, to demonstrate that the search for justice is reasonable and that making an option for the poor is not merely based on a faith commitment. Realizing justice and opting for the poor are reasonable commitments that can be underpinned with arguments. For example: Rawls’ (1971) arguments for the difference principle (economic inequality can only be accepted on the condition that it is also for the benefit of the least advantaged), are an indication that the Christian option is not unreasonable.

With regards to social justice and the economy today, probably the most challenging dialogue partner is Amartya Sen, particularly his book *The Idea of Justice* (Sen 2009), which is not only an outstanding response to Rawls’ magnum opus, but also an unavoidable touchstone for the adequacy of Catholic social thought, an this notwithstanding the fact that some experts are inclined to overemphasize the incommensurability between Sen’s presumed liberal individualism and the common good oriented communitarian justice approach in papal encyclicals. Symptomatic for this interpretation is Séverine Deneulin’s ‘Catholic’ critique to which Sen himself pays attention (Sen 2009: 244–247).

Without denying fundamental differences between Sen’s liberal individualism and the social personalist approach in the Catholic tradition, this article will focus on some underestimated points of convergence between both. In the first part I will outline the most evident of these convergences and, in the second part, I will articulate that even the teleological Catholic ‘common good’ approach is not completely incommensurable with Sen’s concern for the real freedom of the individual.

1. How Sen’s Ideas Corroborate Catholic Social Thinking?

Both Catholic social thought, and Sen’s idea of justice start from indignation about injustice and from the common presupposition that the experience of injustice constitutes a moral duty to seek reasonable ways for a just alternative. That experience is for both rooted in profound emotions. In *Evangelii gaudium* pope Francis interprets them in the perspective of mercy: “we incarnate the duty of hearing the cry of the poor when we are deeply moved by the suffering of others” (Evangelii Gaudium 193). Theologians such as Edward Schillebeeckx refer to ‘negative contract experiences’. Sen starts from the conviction that Adam Smith and David Hume “saw reasoning and feeling as deeply interrelated activities” (Sen 2009: 50).

Both argue, moreover, that moral indignation is a necessary but not sufficient condition and that it need to be followed by moral reasoning. According to Sen “un-scrutinized instincts” can have no “unconditional final say” (Sen 2009: 51). But they do matter because “…in celebrating reason, there is no particular ground for denying the far-reaching role of instinctive psychology and spontaneous responses. They can supplement each other, and in many cases an understanding of the broadening of the liberating [my italics] role of our feelings can constitute good subject matter for reasoning itself” (Sen 2009: 49–50).

Against skepticism about the very possibility of change, both Sen and Catholic social thought refer to hope. Action for justice or reasoning about it, is not meaningless or in vain. In the Pastoral Constitution *Gaudium et Spes* the Church has expressed its belief that when we have “nurtured on earth the value of human dignity, brotherhood and freedom” all these “good fruits of our enterprise” will be once fully realized and ‘transfigured’ in the eschaton (GS, 39). It is not meant to be an argument to remain passive, but a motivation for a commitment in the here and now. In contract, Sen’s language is not theological at all, but nevertheless he expresses his conviction that it makes sense to believe that ‘hope and history rhyme’. His source of inspiration is Seamus Heaney’s poem on hope (Sen 2009: 27).

History says, Don’t hope
On this side of the grave,
But then, once in a lifetime
The longed-for tidal wave
Of Justice can rise up,
And hope and history rhyme

Sen makes an explicit and CST an implicit distinction between rational solutions and reasonable solutions. Sen is averse to any sort of theory characterized by rationalistic forms of complexity reduction. Hence his convincing critique of rational choice theories and of theories which confuse rational behavior with action based on mere self-interest. Sen also proposes that “serious note of critical scrutiny from the perspectives of others must have a significant role in taking us beyond rationality into reasonable behavior in relation to other people” (Sen 2009: 197), and idea most relevant to underpin a commitment to indigenous people whose interest are often completely neglected (but strongly defended by Pope Francis in *Laudato si*).

Sen’s adequate and complex concept of reasoning matches moreover with one of the basic insights from the Thomist Tradition: “doing good is acting according to reason”. Both for CST and Sen human persons are “capable of being reasonable through being open-minded about welcoming information and through reflecting on argument coming from different quarters, along with undertaking interactive deliberations and debates on how the underlying issues should be seen” (Sen 2009: 43).

It is crystal clear that Sen rejects reasoning that excludes the wisdom of religion. He not only takes inspiration from the Hindu tradition, but also from the Gospel. His interpretation of Jesus’ story the good Samaritan is most interesting because for him it is not an argument for more charity, or, as Benedict XVI suggested for ‘charity primordially among Christians’ (*Deus caritas est*, part 2). For Sen the story is about the universality of justice, or, more precisely, the idea of an open impartiality: every human being is ‘neighbor’ and his or her interests and perspectives need to be taken into account in reasoning about realizing a more just state of affairs in the world (Sen 2009: 171–172). In other words: of the good Samaritan is an argument for a non-Rawlsian and non-parochial neighborhood concept (see Sen 2009: 172, 199).

Both Sen and CST reject ideal solutions for a perfect world. While the Catholic tradition has always been suspicious about dreaming of systems “so perfect that nobody needs to be good” (T.S. Eliot) – an insight based on a profound and realistic understanding of the human condition, – Sen also rejects dreaming of perfect institutional arrangements. He focuses more on “how justice can be advanced” than on “what would be a perfectly just institution” (Sen 2009, 9), and this without denying the role of institutions as such. To put it in the words of Sen: “we have to seek institutions that promote justice, rather than treating the institutions as themselves manifestations of justice” (Sen 2009: 82). Structures and institutions are not good in themselves. But while Sen judges institutions in in the light of the consequences of real human behavior and “in the light of concrete social achievements” (Sen 2009: 83). Official Catholic social teaching doesn’t use that expression, but it does go beyond vague references to the human person ‘adequately considered’ or human dignity in general. For example Pope Francis clearly states that “we are not simply talking about ensuring nourishment or a ‘dignified sustenance’ for all people, but also their general temporal welfare and prosperity. This means education, access to health care, and above all employment, for it is through *free, creative, participatory and mutually supportive labor* that human beings express and enhance the dignity of their lives” (*Evangelii Gaudium* 192).
A fifth common insight is that both Sen and CST strongly believe in the universality of human rights as grounded in ‘our shared humanity’ (Sen 2009: 143). Significant in this context is Sen’s reference to the word ‘catholicity’: “we have reason for some catholicity in considering different avenues for promoting” rights as “moral claims” (Sen 2009: 364). Sen’s ‘catholicity’ goes much further than his attention for human rights. It is the basis of his rejection of Rawls ‘parochialism’ in the Law of Peoples (Rawls 1999), in which Rawls reduces the possibility of applying principles of justice to liberal and decent states. In public reasoning about reducing injustice one should not adopt a closed impartiality (Rawls 1971), but an open impartiality, which requires “taking into account the interests” and also the “perspectives” (Sen 2009: 402) of even the distant “other”. Crucial in this regard is the “inclusional broadening” as “the broadening of the collectivity of people whose interests are seen as relevant” (Sen 2009: 199). As such there is room for ‘insignificant others’ (an idea which matches with liberation theology). Sen urges us to pay attention “to the extent to which different voices from diverse sections of the people can be actually heard” (Sen 2009: xiii). Against Rawls, he also includes poor countries (burdened states) in the reasoning about justice. In contrast with “parochialism”, one must look at the world “by the eyes of the rest of mankind” (Sen 2009: 406). “Arguments that may first appear outlandish (…) may help to enrich our thinking” (Sen 2009: 407).

Like Pacem in Terris and the Universal Declaration of Human Rights Sen acknowledges not only freedom rights (first generation rights) but also following Pogge and unlike Rawls in the Law of Nations, universal social rights or, in his words, “second generation rights” for the fulfillment of ‘imperfect global obligations” (Sen 2009: 381). Sen defines these second generation rights as the long term goals the role of which is “to secure an adequate level of agency and morally basic capabilities for everyone in the world –regardless of nationality, ethnicity, religion, age, gender, or sexual preference” (Sen 2009: 381). Although Sen doesn’t refer to human dignity as moral ground for human rights, it is obvious that he rejects any sort of legal positivistic interpretation: Laws must be based on human rights it and not vice versa: while Bentham saw ‘rights as a ‘children of the law’, human rights are according to Sen ‘parents of law’ (Sen 2009: 363).

2. Two More Complex Points of Convergence: Justice and Freedom

One could say that Sen’s idea of justice differs from the catholic tradition in so far that it is not directly related to the normative and teleological idea of the common good. But in Catholic social thought the ‘common good’ can be interpreted in different ways: as the fundamental normative purpose of the state or the world community (the ‘universal common good’), or as a means to that purpose (cf. Gaudium et spes 26 and 74: “the sum of those conditions of social life” which allow social groups and their individual members “to attain their own perfection”). But there is a third interpretation proposed in Economic Justice for All (1986) a pastoral letter on the economy by the US bishops. They interpret the common good as the realization of a participative society: “Basic justice demands the establishment of minimum levels of participation in the life of the human community for all persons”, “especially the poor” (Economic Justice for All, 77 and 86).

The US bishops’ interpretation is an excellent articulation of what is already implicitly assumed in the broader Catholic tradition. In that tradition (at least since Aquinas) the first point of consideration is the duty or responsibility of citizens to contribute to the common good. Aquinas refers in this regard to the word ‘general’ or ‘legal’ justice. In order to avoid confusion with the nineteenth century law positivistic interpretations of ‘legal justice’, catholic authors such as Taparelli d’Azeglio have introduced the concept
of ‘social justice’ as a substitute for the concept of legal or general justice. It was officially endorsed in the encyclical Quadragesimo anno (1931). More recently the US bishops have enriched the social justice approach, by way of distinguishing two aspects of it: a duty of individuals to contribute and a duty of the society to enable them to do this. On the one hand there is contributive justice as duty “to be active and productive participants in the life of society”. It implies not only a participation in the economy, but also the creation of “goods, services and nonmaterial and spiritual values” necessary for the wellbeing of the whole of society. Hence, not only work matters, but also other human activities such as arts, poetry, conviviality, voluntary work, contemplation, care etc...(Economic Justice for All 1986: 71).

On the other hand, the “duty component” of social justice, expressed in terms of ‘contributive’ justice, is connected with a second element according to which citizens must also be enabled to make their contribution. Precisely this concern for ‘enabling’ people to become active participants in the society is one of the major concerns of Sen (who talks about empowering people).

In the Catholic tradition there is a risk to reduce the enabling function, which partially overlaps with the concept of distributive justice, to “the allocation of income, wealth and power in society... evaluated in light of its effects on persons whose basic material needs are unmet” (Economic Justice for All 1986: 71). Particularly in Quadragesimo anno the focus is on a distribution of goods. “…the riches that economic-social developments constantly increase ought to be so distributed among individual persons and classes that the common advantage of all... will be safeguarded…” But the text continues with something more relevant: The safeguarding of the common advantage of all is immediately articulated as follows: “that the common good of all society will be kept inviolate. By this law of social justice, one class is forbidden to exclude the other from sharing in the benefits... To each must therefore be given his own share of, goods, and the distribution of created goods, which... must be brought into conformity with the norms of the common good, that is social justice (QA 57–58).”

In this perspective there is much more than merely a concern for the distribution of goods or the fulfillment of basic needs. Social justice is above all about the realization of a participative society in which citizens are enabled to contribute, and thus to participate. This contribution to the whole presupposes free persons as actors. In the words of the US bishops: “The meaning of social justice [which in the words of QA = the common good] includes a duty to organize economic and social institutions so that people can contribute to society in ways respect their freedom and the dignity of their labor”, and which enables them to become “more capable of acting intelligently, freely, and in ways that lead to self-realization” (Economic Justice for All 1986: 72).

The creation of a society in which people can realize their potential with real freedom matches quite well with Sen’s capability approach, as well as with Sen’s believe in a participative society in which also the poor have a stake as participants in the reasoning about the creation of a just society. But there is more. A recent evolution in Catholic social thought must be mentioned: a more radical interpretation of the common good in the light of the (preferential) option for the poor. This principle is a result of the dialogue between the magisterium of the Catholic church and liberation theology and, it is recently strongly reaffirmed by pope Francis in his apostolic exhortation Evangelii gaudium. This principle has also an objective dimension as realistic assessment of lifestyles, policies, and social institutions in terms of their impact on the poor, who are not only considered as objects of care, but also as subjects of their history. In this Sen’s thinking can be useful for Catholic thinking in so far as it contributes to a more substantial articulation of what poverty is (a lack of capabilities to function) and what the concrete implications are of a real option for the poor. Sen interprets development not only in terms of freedom, but also as an ‘empowering process’ (Sen 2009: 249), an idea which has more affinity with the liberation paradigm than
with classical development thinking. The Catholic tradition of thought hesitates between the two (some encyclicals put emphasis on development, other texts and liberation theologians opt for the liberation paradigm). Sen also puts much emphasis on the participation of the poor in democratic decision making. According to him democracy is not primordially a matter of public ballots but ‘government by discussion’. This government by discussion requires at a global level “public discussion of, for and by the people of the world” (the “by” the people is crucial here, Sen 2009: 328).

A second point for clarification is freedom. On the one hand Sen explicitly rejects the idea that he would defend as sort of radical individualism. It is beyond doubt that Sen focuses mainly on the flourishing of the individual and on the real freedom to choose the sort of life they have reasons to choose and want to achieve. But this doesn’t imply that he is a methodological individualist or, that he would underestimate the social dimension of life. Sen himself proves to be very sensitive to this question. In his discussion with Séverine Deneulin, he explains that he would never contend that there is no such thing as the society as a sort of intermediate space between the individual and the state. He only warns against an ideology of the society according to which it becomes a reality apart from individuals, in his words: the “reestablishing of society as an abstraction vis-à-vis the individual” (Sen 2009: 245).

In Sen’s perspective, an individual is always interacting with society. He explicitly rejects the presumption “of independence of the thoughts and actions of persons from the society around them” (Sen 2009: 245). His methodological emphasis on open impartiality is, moreover, an indication of the relevance of society and the relevance of “people far and near – in the valutational exercise of individuals” (Sen 2009: 245). As much as the Catholic tradition, Sen emphasizes that freedom has to be as ‘freedom with responsibility’, that it “makes us accountable for what we do” (Sen 2009: 19) and, that it leads to a behavior that transcends mere self-interest: one has to move from the “pursuit of actual advantage for oneself to promotion of advantage for the community” (Sen 2009: 204).

Apart from this, one must admit that Sen is less group or community oriented than CST. A relevant point in this regard is Sen’s warning against the reduction of the identity of an individual to be “merely a member of a group to which he or she belongs” (Sen 2009: 147), but this remark is not an expression of a sort of individualism, but a critical argument against any form or parochialism or nationalistic thinking at the cost of the interests of people outside the group. People can have multiple loyalties: “people can decide on their respective loyalties to different groups” (Sen 2009: 245).

On the other hand There is more room for individual freedom in Catholic social thought than it might appear in some official texts. In the pastoral constitution of Vatican II, Gaudium et spes, which is epistemologically the most important Catholic text on social issues and thus a text which serves as a critical touchstone for the interpretation of later official texts, individual freedom is defined in a way which is much more profound than a matter of obedience to the interpretation of moral norms by the magisterium. Most significant is the first part where the council fathers refer to conscience as the ‘most secret core and sanctuary’ of the human person (Gaudium et spes 16), which is immediately linked with the idea that “only in freedom can man direct himself towards goodness” and that “authentic freedom is an exceptional sign of the divine image within man. For God has willed that man remains under the control of his own decisions…” (Gaudium et spes, 17). Although this is directly linked with the search for perfection, loyalty to God, and the need of grace, the text continues unambiguously as follows: “…Man’s dignity demands he acts according to a knowing and free choice that is personally motivated and prompted from within, not under blind internal impulse nor by mere external pressure” (Gaudium et spes, 17). In other words: there is indeed more space for authentic individual freedom in Catholicism than one
might think, and as we have pointed out above, the common good requires that individuals are enabled to act according to genuine freedom.

3. Conclusion

Far from pretending that Sen’s *Idea of Justice* and the Catholic vision on justice simply overlap, I have argued that there is more affinity between both than some Catholic scholars would admit. Even when there is *sensu stricto* no teleological ‘common good’ approach in Sen’s idea of justice, his idea of justice offers as much as the Catholic tradition a realistic and reasonable argument for a participative society in which all citizens and especially the poor are enabled to make a meaningful contribution.

Sen’s magisterial work can, moreover, read as a challenge to both Church leaders and economists: if they want to be relevant participants in a debate about *reasonable* steps towards a more just world society, they must abandon absolute truth claims as well as reductionist rational models or “parochialist” ideas. Indeed, paraphrasing Sen, one can say “if rationality were to be a church, it would have to be a rather broad church” (Sen 2009: 195).

References


