

FR. JERZY GOCKO SDB<sup>1</sup>  
John Paul II Catholic University of Lublin  
ORCID ID: 0000-0002-6513-5681

## METHODOLOGICAL STATUS OF THE SOCIAL DOCTRINE OF THE CHURCH BEFORE THE SECOND VATICAN COUNCIL

### Abstract

The present article raises the issue of the methodological status of the Church's social doctrine from its beginnings, namely, from the social teaching of Leo XIII, to the Second Vatican Council. In the first part, the author highlights the substantial role of the Magisterium in constituting the Church's social doctrine. The second part, presents an analysis of the key social documents of the Church, with particular emphasis on methodological strands. The reflection is based on the assumption that the Church's social doctrine is not just another ecclesial scientific discipline, since it involves a more complex reality in terms of practitioners, methods, sources of cognition or, finally, the nature of assertions formulated within that area of science.

**Keywords:** the Church social doctrine, methodology of the Church social doctrine, history of the Church social doctrine, Leo XIII, Pius XI, Pius XII, John XXIII

## STATUS METODOLOGICZNY NAUKI SPOŁECZNEJ KOŚCIOŁA PRZED SOBOREM WATYKAŃSKIM II

### Abstrakt

Przedmiotem artykułu jest zagadnienie statusu metodologicznego nauki społecznej Kościoła od jej początków, a więc od nauczania społecznego Leona XIII, do Soboru Watykańskiego II. W pierwszej części autor ukazuje Magisterium Kościoła jako aktywny podmiot w ukonstytuowaniu się nauki społecznej Kościoła. W drugiej poddaje analizie kluczowe dokumenty społeczne Kościoła, wydobywając z nich wątki metodologiczne. W podjętej refleksji przyjęto założenie, że w przypadku nauki społecznej Kościoła chodzi nie tylko o kolejną kościelną dyscyplinę naukową, ale o rzeczywistość bardziej złożoną pod względem podmiotów ją uprawiających, metod, źródeł poznania czy w końcu charakteru twierdzeń, do których dochodzi.

**Słowa kluczowe:** nauka społeczna Kościoła, metodologia nauki społecznej Kościoła, historia nauki społecznej Kościoła, Leon XIII, Pius XI, Pius XII, Jan XXIII

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<sup>1</sup> Fr. Prof. Jerzy Gocko is the head of the Department of Social Moral Theology at the John Paul II Catholic University of Lublin, editor-in-chief of "Seminare. Learned Investigations" and "Annals of Theology" fascicle 3: Moral Theology. Mailing address: [Jerzy@Gocko.pl](mailto:Jerzy@Gocko.pl).

## INTRODUCTION

Determining the methodological identity of a given scientific discipline is an important element which constitutes that discipline at the same time defining its specificity and nature. Consequently, throughout the history of Catholic social teaching there have been numerous studies devoted to this subject. Some of them have the character of extended monographs, but most often methodological issues have been raised with reference to other questions. An important role has also been played by comprehensive studies of Catholic social teaching, since almost all of them contain either longer or shorter passages devoted to their methodological status.

However, the character of both methodological studies and the related discussions within Catholic social teaching differs from similar debates held in the area of other church disciplines. This is due to the active role of the Church's Magisterium which, along with theologians and social ethicists, took part in the scientific dispute and recurrently addressed this subject on various occasions.

The present study aims at illustrating the process of crystallizing the methodological identity of Catholic social doctrine from its beginnings, namely, from the social teaching of Leo XIII to the Second Vatican Council. In the first part, the reflection focuses on presenting the Magisterium as an active subject in the constitution of the ecclesial social doctrine. In the second one, the key social documents of the Church are analyzed in order to highlight the main methodological strands contained in them. The conducted research is based on the fundamental assumption that the Church's social doctrine is not just another ecclesiastical scientific discipline, since it involves a more complex reality in terms of practitioners, methods, sources of cognition or, finally, the nature of assertions formulated within that area of science.

### 1. *MAGISTERIUM ECCLESIAE* AS AN ACTIVE SUBJECT IN THE METHODOLOGICAL DEBATE

It is a specific paradox of the Church's social doctrine that, as a methodologically ordered reflection on social reality (scientific discipline), it emerged beyond the sphere of theological disciplines existing at that time, since it was developed within a strictly defined "theological space", namely, the teaching of the Magisterium, and more precisely, the Papal Magisterium. This is the only case in the history of Catholic theology, when its large section was created, developed, promoted and overviewed directly by popes through magisterial documents which had, in a sense, a definitive character, or in any case, were excluded from ordinary debates by the growing importance of the institution of *corpus doctrinae* (Benvenuto 1991, 11).

This situation, as must be clearly stressed, resulted from the absence of theology, especially moral theology, in the area of social issues as well as lack of competent theory of society or deep reflection on social life, and not some kind

of usurpation on the part of the Magisterium of the prerogatives of theology or an attempt at its marginalization. The emergence of Catholic social teaching as an independent and specific area of reflection within overall theological reflection took place not so much in result of theoretical reflection on its subject, methods and tasks, but rather under the influence of specific challenges that other ecclesiastical disciplines, and especially moral theology, could not adequately answer.

From the perspective of the Church's social doctrine, it is clear that the Papal Magisterium was not only the main protagonist of the new form and the significant development of scientific reflection about social issues within ecclesiastical disciplines, but it also became an active subject in the methodological debate on it. Some statements contained in social encyclicals referring to the theological character of Catholic social teaching or its explicit affiliation to moral theology (John Paul II 1987, 41; John Paul II 1991, 55) met with disapproval on the part of representatives of the Church social doctrine, who perceived in them an attempt at providing an arbitrary solution to the methodological status and epistemological problems of Catholic social teaching, and thus expanding the competences of the Church *in rebus fidei et moribus* to matters related to the methodology of science.

## 2. LEO XIII AND THE BEGINNING OF A NEW PATH

Clear methodological references, first to the character of papal enunciations on social issues, and later also to Catholic social teaching as ecclesiastical and academic discipline, can be found in all major social documents beginning with the encyclical *Rerum Novarum* of Leo XIII, which constitutes a response to “*the first great social question*” (Pontifical Council for Justice and Peace 2005, 89). It is this encyclical that “marks the beginning of a new path. Grafting itself onto a tradition hundreds of years old, it signals a new beginning and a singular development of the Church's teaching in the area of social matters” (Pontifical Council for Justice and Peace 2005, 87).

However, from the chronological point of view, a thorough reading of the Leo XIII's documents allows to discern some statements about the nature and specificity of Catholic social teaching that appeared in encyclicals preceding the announcement of *Rerum Novarum* in 1891, since already the Pope's inaugural encyclical *Inscrutabili Dei Consilio* contains significant words about the Church as the “Mother and Teacher” of the world and modern civilization, which will not only after more than half a century later become the title of the first social encyclical of Saint John XXIII, but themselves show the basic paradigm of the Church's presence in the world (Leo XIII 1878)<sup>2</sup>. Perhaps at the beginning of Leo XIII's long pontificate when, on one hand, the echo of the *Syllabus* was still loudly resounding, and on the other, the modernist crisis together with all, sometimes painful, countermeasures, stood on the doorstep, that paradigm was still difficult to grasp, but it already began to crystallize itself.

<sup>2</sup> “Quod si plurimae aquae memoravimus bona, ab Ecclesiae ministerio et salutario pefrecta,

The remaining encyclicals by Leo XIII preceding *Rerum Novarum* contained statements which carried similar overtones. In the encyclical *Immortale Dei* from 1885, Leo XIII refers to the metaphor of the soul and body to define the relations of the Church and the state, and wants the state to be guided by the principles and norms of Christian philosophy. In turn, in a polemic with liberalism contained in the encyclical *Nobilissima Gallorum Gens* of 1884, the Pope expresses his opposition to the abandonment in the political life of dogmatic and moral norms manifested by the very nature of God. The encyclical *Graves de Communi* of 1901, contains, in turn, an important statement that the social question has foremost a moral and religious dimension. The motif of separation of Church and state will often return in subsequent encyclicals in the course of developing the concept of “indirect power of the Church” in temporal rights (especially encyclicals *Libertas* (1888), *Sapientiae Christianae* (1898) and *Annum Ingressi* (1902)). By this teaching, Pope Pecci will also create the foundations for the activities of the Catholic Action and Catholic social structures.

The encyclical *Rerum Novarum* itself barely addresses the issue of methodology or the nature of the social discourse of the Church. Above all, it calls for renewing Christian customs (Leo XIII 1891, 45) and, moreover, mentions the teachings of the Gospel, “upon those teachings whereby the conflict can be brought to an end, or rendered, at least, far less bitter” (Leo XIII 1891, 13).

The encyclical expresses the Church’s self-awareness about the need to manage the lives and customs of individuals by means of the commandments (Leo XIII 1891, 13). Indirectly, it also shows the dual cognitive order of laws governing social life (the reason and Christian faith) when she speaks of the nature of state power (Leo XIII 1891, 28).

### 3. *RERUM NOVARUM* AS THE DOCTRINAL PROTOTYPE OF CATHOLIC SOCIAL TEACHING

The significance of the encyclical *Rerum Novarum* will find its repercussions most forcefully in subsequent social documents, from the encyclical *Quadragesimo Anno* of Pius XI, to *Centesimus Annus* of John Paul II. It found a synthetic expression in the Compendium of the Church’s social doctrine: “*Rerum Novarum* dealt with the labour question using a methodology that would become ‘a lasting paradigm’ for successive developments in the Church’s social doctrine. (...) The whole of the Church’s social doctrine can be seen as an updating, a deeper analysis and an expansion of the original nucleus of principles presented in *Rerum Novarum*. With this courageous and farsighted text, Pope Leo XIII gave the Church ‘citizenship status’ as it were, amid the changing realities of public life” (Pontifical Council for Justice and Peace 2005, 87; John Paul II 1991, 60).

Many documents constituting the *corpus socialis*, having an anniversary character in relation to the publication of *Rerum Novarum*, undertook its

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verasant ’humanitatis civilis opera ac decora, tantum abestut Ecclesia Christi ab ea abhorrea team verespuat, ut ad sesepotiusaltricus magistrae et matri seius laudem omni nocen seat pertinere.”

reinterpretation, emphasizing its prophetic character and significance for the development of the whole social doctrine of the Church. Pius XI defined the content of the encyclical *Rerum Novarum* as “a safe way to settle the difficult matter of human coexistence, the so-called social issue (...) at a time when it was desirable and even necessary” (Pius XI 1931, 2).

Pope Ratti perceives it also as a response to the pleas addressed by scholars dealing with social, employers’ and workers’ issues addressed to the Apostolic See “to show a safe path” (Pius XI 1931, 7); an answer given after a thorough examination with the help of professional experts on the matter, and above all, an answer which was a manifestation of the apostolic office (Pius XI 1931, 8).

The encyclical *Rerum Novarum* was therefore the fruit of Leo XIII’s imperative of conscience in the face of social appeals and challenges of the time. Social science drawing inspiration from that document will hence be marked by this connotatory responsiveness of the Church to the challenges of a given epoch. It is worth emphasizing here the occurrence of the above-mentioned situational factor at the beginning of Catholic social teaching. From the very outset, it was one of major factors determining its specific character and identity, although in the course of its further evolution it began to be dominated by the theoretical dimension.

The subsequent jubilees of the encyclical *Rerum Novarum* provided an opportunity to show its significance in the development of social science. After four decades since the publication, Pius XI called it a “*Great Card* for all Christian work in the social field” (Pius XI 1931, 39). Pius XII in the Pentecost radio address to commemorate the 50th anniversary of the encyclical *Rerum Novarum* will once again bring this term, and refer to the encyclical itself as a fertile seed from which Catholic social teaching developed (Pius XII 1941, 6-7). Furthermore, as regards the teaching of the encyclical, the Pope will highlight its epistemology based on natural law and the Revelation (Pius XII 1941, 4). In turn, Saint John XXIII in the encyclical *Mater et Magistra*, proclaimed on the 60th anniversary of *Rerum Novarum*, will emphasize “its effective and long-term influence”. In the first place, it is manifested in subsequent documents of the popes, “who, following in the footsteps of Leo XIII in economic and social matters, always drew upon Leo’s encyclical, either lecturing and explaining its content, or encouraging Catholics in their undertakings” (John XXIII 1961, 9). Pope Roncalli also stressed the importance of the encyclical on the science and institutions of many countries, paying attention to the timeliness and importance of carefully researched principles, norms of conduct and admonitions (Jan XXIII 1961, 9).

The encyclical *Rerum Novarum* became a prototype of subsequent documents of the Church, as well as a model for the further development of social science and a point of reference for Christian social activity. In addition to the aforementioned existential dimension, this model dimension is perceived by the Compendium of the Church’s social doctrine in such elements as: material object (study of the current social issue), formal object (carrying out proper assessment

of social issues in the light of principles in order to create a just social order), sources of cognition and the method (examining social issues in all different social and political manifestations in the light of principles based on Revelation, natural law and morality), subject (the Church and everyone interested in resolving social issues), prophetic and critical function (discovery of errors that cause social evil, introduction of social changes, improvement of justice) (Leo XIII 1891, 89-90).

Mariano Foralosso, commenting on the contribution of Leo XIII and the encyclical *Rerum Novarum* in defining the shape and identity of the social teaching of the Church, points not so much to the inaugural first social encyclical, but to some terms used with reference to it in the first social documents (“safe principles”, *Magna Charta*, summa of Catholicism in the social and economic area, foundation, etc.) as the ground for the development of the concept of social science as a deductive, holistic doctrinal system, separated from historical events and deaf to pluralism of the social situations of a given epoch, what in the period of the Conciliar reception became the reason for its contestation (Foralosso 1993, 210). It seems that this kind of interpretation of comments to the encyclical by the Magisterium is only partially justified and should always be referred to the broader doctrinal and theological context in which a given document was created.

#### 4. FROM *RERUM NOVARUM* TO THE SECOND VATICAN COUNCIL

Leo XIII, when making an attempt at identifying possible solutions to the issue of labor, referred to the right-obligation to speak on social and economic matters (Leo XIII 1891, 13). This principle was most fully articulated by Pius XI and, in the context of the present investigations, it seems plausible to recall the course of the Pope’s reasoning since it well reflects the specificity of the Church’s social teaching. The author of *Quadragesimo Anno*, justified the Church’s right to present its stance in matters of social life by the inextricable nature of the moral and economic order: “Even though economics and moral science employs each its own principles in its own sphere, it is, nevertheless, an error to say that the economic and moral orders are so distinct from and alien to each other that the former depends in no way on the latter” (Pius XI 1931, 42).

At the same time, the Pope emphasized that the goal of all directions of human activity, and thus also economic activity, must be synchronized with the ultimate goal of man, because he is striving toward God in an integrated way, in the full range of his personality. Therefore, a person should endeavor to learn about this goal of the economic life, so that it would not preclude his final vocation. In turn, the distinction between two areas of human activity in the field of economics, namely, the technical and moral, provided for the Pope a premise to define the nature and scope of the Church’s competence in economic matters and recognize the latter as belonging to the competence of the Church: “The Church, however, can in no wise renounce the duty God entrusted to her to interpose her authority,

not of course in matters of technique for which she is neither suitably equipped nor endowed by office, but in all things that are connected with the moral law. For as to these, the deposit of truth that God committed to Us and the grave duty of disseminating and interpreting the whole moral law, and of urging it in season and out of season, bring under and subject to Our supreme jurisdiction not only social order but economic activities themselves” (Pius XI 1931, 41).

Subsequent documents and elaborations on the social doctrine of the Church will hark back to that differentiation with reference to the issue of the validity of the statements formulated by the Church concerning social issues. It is worth mentioning here that the intention of the Church is to distinguish many levels in social teaching, hence those documents mention “principles of reflection”, “criteria of judgment”, “direction of action”, rather than specific norms. By her teaching, the Church wants to lead, and leave the faithful make the decision or abandon it. Each person should give an answer, on the one hand adhering to the Church’s teaching and, on the other, referring also to other sources of knowledge, either more permanent ones, which include reasoned reflection, or more variable ones, which include human sciences and social sciences (John Paul II 1987, 1).

The Church’s right-obligation “to develop a social doctrine of her own and to influence society and societal structures with it by means of the responsibility and tasks to which it gives rise” (Pontifical Council for Justice and Peace 2005, 69) involves an immanent prophetic and critical function. Notwithstanding the fact that, at the time of the reception of the encyclical *Quadragesimo Anno* and the dynamic development of Catholic social structures as well as numerous centers of studies and dissemination of Catholic social teaching, this function did not constitute its key attribute, it is difficult not to interpret a number of Pius XI’s documents by this prism. It suffices to point in this respect to the Pope’s social encyclicals directed against various totalitarian systems, or even the teaching of Pius XII during the war, in which the Pope, besides indicating the evil of totalitarianism, also drew visions of restoring the future social order based on the assumptions of Christian personalism.

The ultimate explanation of the Church’s right-obligation with respect to her own social teaching with interesting epistemological references was found in the already mentioned radio address on the occasion of the 50th anniversary of the encyclical *Rerum Novarum*. It can be treated as expanding the interpretative horizons, which in the long run resulted in a more dynamic approach to the problem of the social discourse of the Church. It is worth quoting this longer passage here, since it also touches on other important methodological issues developed in subsequent social documents, most fully in the encyclical *Sollicitudo Rei Socialis* of John Paul II: “It is, on the other hand, the indisputable competence of the Church, on that side of the social order where it meets and enters into contact with the moral order, to decide whether the bases of a given social system are in accord with the unchangeable order which God, our Creator and Redeemer,

has shown us through the natural law and revelation, that twofold manifestation to which Leo XIII appeals in his encyclical, and with reason: "For the dictates of the natural law and the truths of revelation spring forth in a different manner, like two streams of water that do not flow against one another but together from the same divine source; and the Church, guardian of the supernatural Christian order in which nature and grace converge, must form the consciences even of those who are called upon to find solutions for the problems and the duties imposed by social life. (...) how could the Church, loving mother that she is, solicitous for the welfare of her children, remain an indifferent onlooker in their danger, remain silent or feign not to see or take cognizance of social conditions which, whether one wills it or not, make difficult or practically impossible a Christian life in conformity with the precepts of the Divine Lawgiver?" (Pius XII 1941, 4).

Pope John XXIII's social teaching seem very interesting from the methodological point of view. On the one hand, it expands on the existing ideas, developing the earlier tendencies or trends and, on the other, it may be recognized as groundbreaking, however, without undermining the essential identity and unity of the Church's social doctrine (Congregation for Catholic Education 1988, 12).

The Pope defines Catholic social teaching as "instructions in the area of social issues based on the needs of human nature itself and animated by the principles and spirit of the Gospel" (John XXIII 1961, 15). He also uses other terms expressing the nature of the social doctrine of the Church, namely: Catholic teaching in social and economic matters (John XXIII 1961, 15), orders and principles of teaching the Catholic Church in social matters (John XXIII 1961, 16), the basic principles for renewing the coexistence between people and, at the same time, renewal of economic and social life (John XXIII 1961, 17). The Pope mentions also the basic principles upon which a genuine social and economic order must be built (John XXIII 1961, 24). All the above documents clearly show the social doctrine of the Church as an abstract and coherent doctrinal *corpus*.

On the other hand, the social teaching of John XXIII, as none of the previous ones, points to the significance of the temporal, existential dimension, thus expressing the historical dynamism of social phenomena. Adhering to the significance of the first two social encyclicals, the Pope includes in the Church's tasks direct contribution to providing solutions to the urgent social problems that affect mankind. At the same time, he emphasizes that the principles developed in those documents should be implemented under new conditions, and that the role of the Church, apart from explaining the social doctrine itself, consists also in showing in what sense those principles and recommendations concerning the social system, should be adapted to the changed historical conditions (John XXIII 1961, 28).

The contextual dimension of John XXIII's social teaching was additionally strengthened by its anthropological aspect, since the Pope, was not only convinced that "Catholic social doctrine is an integral part of the Christian conception of life" (John XXIII 1961, 222), but he regarded this anthropological and personalistic



dimension as the basis of Catholic social doctrine: "This teaching rests on one basic principle: individual human beings are the foundation, the cause and the end of every social institution" (John XXIII, 219).

Such an explicit recognition of the importance of historical thinking in an official papal document, thinking which was becoming more clearly manifested in the scientific discourse of the first half of the last century, became a breakthrough whose consequences affected the overall theological thought. The social teaching of John XXIII well illustrates the phase of transition from the period in which historical thinking remained for a long time at the periphery of theological reflection (from Saint Justin's times, through Origen, all Christian Neo-Platonism, St. Thomas Aquinas and scholastics) and in which was dominated by the theology based on the assumption that the reality which it describes - ideal, divine, eternal and immutable - is "ahistorical", to the approach in which history is understood as creative, generative and personalizing. Man in his entirety as well as the reality that he touches upon is the object and subject of history. Man is history in himself, subject not only to time but also to the dimension of space, which is the second "non-negligible" category of historicity (Bartnik 1994, 209).

The process of enhancing the historical element in the theological and social discourse of the Church was accompanied by a second one with a similar, if not greater, impact on the Christian theological and social thought, which must be described as an anthropological breakthrough. It is manifested in the adoption and development of an integral personalistic concept, on the one hand, emphasizing the value and dignity of the human person, and on the other, the autonomy of earthly realities already mentioned several times in this study. It resulted in a different view of man's involvement in earthly matters and, moreover, led to adopting as the basis of all analyzes, evaluations and decisions, including social ones the moral thought understood in the Christian dimension, which means that man is perceived integrally in his corporal and spiritual constitution, taking into account his supernatural vocation and emphasizing the dignity and values, in the light of which the question of his transcendence in relation to the sphere of social life becomes clear (Greniuk 1991-1992, 50-51).

Gerardo Tomás Farrell, an Argentinean scientist dealing with the social doctrine of the Church, in a characteristics of the social teaching of Saint John XXIII, particularly pertains to the Latin phrase of *singulos homines*, contained in the already mentioned passage of the encyclical *Mater et Magistra* and emphasizes that it is a particular, concrete man that constitutes the object of interest for the social discourse of the Church. Farrell contends that by adopting this perspective, John XXIII was able to abandon the static concept of the natural law. At the same time, he perceives in it a strong connotation with the concept of "common good" recurrently appearing in the encyclical (Farrell 1993, 31-32). The replacement of this concept by John XIII, and even more frequently by Paul VI, with such terms as: man, human dignity, human rights, justice, etc., was a manifestation of a more

dynamic interpretation of the natural law. All those confirm the abandoning of the social doctrine of the Church as an abstract, closed and holistic system, whose application to the life of a specific man and the world's history is possible only through deduction. This process will find its continuity in the reflection of the Second Vatican Council on the relation between the Church and the world, which demands that "correct assessment of the relationship between the political community and the Church should take place" (Vatican Council II 1965, 76). This was to be promoted by the conciliar theology of the signs of the times as well as a shift towards a new inductive-deductive method.

## CONCLUSION

The growing importance of historical thinking as well as the anthropological breakthrough, besides leading to a different view of human involvement in earthly matters, resulted in adopting a different perspective on the place of the Church in the world, and indirectly also influenced the nature of the Church's social doctrine ultimately orienting the whole theology anthropologically. From then on, the Church, while addressing the issue of human activity in the world and proclaiming certain principles of social order, derives them from anthropological statements. From the encyclical *Mater et Magistra*, the official social teaching of the Church as a starting point accepts the principle that man is at the foundation of all structures (Curran 1986, 189-2003).

The dignity of the human person, conceived of on the basis of the full truth about man, provided the foundations for Catholic social teaching. This anthropological perspective on the whole reality of human social involvement will be expanded upon by successive popes, especially, St. John Paul II, who made an attempt at presenting the most complete vision of the person (Meures 1987, 222-236).

To sum up the methodological aspects of the Church's social doctrine contained in the stance of the *Magisterium socialis* in the period from the encyclical *Rerum Novarum* to the Second Vatican Council, it must be stated once again here that the Magisterium proved to be an extremely creative subject in the debate on the identity of the Church's social teaching. Individual popes, and even particular social encyclicals, appear as milestones in the process of its development, they set the directions for reflection, highlight and, above all, enliven the social *praxis* of the ecclesiastical community and individual faithful.

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