

European Social Policy and Catholicism: A Historical Overview

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ABSTRACT

This paper presents a comprehensive analysis of the interaction between the Catholic Church and the European states in the sphere of social security. The purpose of the research is to determine cooperation between the State and the Church in the European countries in the social sphere. It is recognized that one of the first institutions that have responded to social challenges was the Catholic Church. In Germany, Austria, and Italy, this institution takes an integrative part in the social security process. In France, the State tries to give social support itself. It is concluded that nowadays Church continues to create a theoretical and practical framework for social security at different levels and in different forms. The research result is the following: Christian values influenced the social integration of the European countries.

Keywords: *Social security, European Union, social state, Catholic Church, social catholicism, integration, policy, encyclical*

1. INTRODUCTION

The economic, political, and cultural level of world globalization is constantly increasing.

The European continent is being filled with new integration initiatives. These political and economic integration projects construct an international social reality too.

The European Union has become the pioneer of the global multi-country integration community.

The European states have a unique history, political and economic systems, which determine their particular way of social security evolution. The development strategy of many European countries initially included two main components: economic growth and social security that were based on fair public wealth.

The social security system of the European countries can be a good example because of its institutions and mechanisms of social management, taking into account its mistakes, experience, and success.

In the history of the European countries' social security system, it is necessary to distinguish such separate institutions, such as the Catholic Church, that has played an important role. Catholic social teaching has contributed much to the social reflection.

Nowadays, the constitutions of the European countries recognize the independence of the State from the Church. However, this question of political autonomy is still open and quite painful [1]. These institutions are fully united, maintaining human life, dignity, and social rights [2].

The State's social function is to balance employers' and employees' interests and provide assistance to people who are not supported by the corporate social insurance system.

1.1. Research Methodology

This research reveals forms and peculiarities of cooperation between the Catholic Church and the European countries in the social sphere.

The universal dialectical method of cognition of social phenomena and process, and general and special scientific methods such as comparative legal, formal legal, and system analysis are used in this research.

The formal legal method is used to identify the forms of cooperation between the Church and the State in the social process.

The comparative legal method helps to compare legal regulation of participation of the Church in the social process. These research methods help identify some problematic areas in the social cooperation between Church and State through the example of the European countries.

2. RESULTS

Most modern states are declared as social ones according to their social legislation. However, some problems have systematically arisen that lead to doubts about the effectiveness of social support models. The effectiveness of the implemented public policy depends not only on the legal framework but also on other factors.

Catholic teaching is the only religion that has carried out extensive and continuous scientific research in economic and social development. According to it, economics includes three components: Christian, social, and material. The Christian component deals with the sphere of human labor application;

the social component covers the sphere of the individual's social life; the material part is connected with the responsibility for producing material goods.

The cooperation in the social security sphere between the State and the Church began in the XIX century. The scientific and technological progress brought Europe to a process of industrialization. It led to the change in society's social structure and the enormous damage of human capital [3].

During the French bourgeois revolution, the primacy of State over Church was established in the French legislation. Later this process was spread through all European countries, so the Church was forced to look for new organizational forms of social activity. After the revolutionary period, the European states began to proclaim social security ideas, but they could not guarantee their fulfillment.

The European countries were trying to build a social security system [4]. Most of them had to search for a new tradition of joint participation in social relations. State and Church initiatives have cooperated in the form of various associations and unions that have taken care of widows, children, and other people. They arranged nurseries, heating rooms, shelters. For a long time, the European states have tried to make a legal framework to increase the social benefits from religion. The influence of the Church can have both negative and positive effects [5].

The history shows that the restrictive legislation in the sphere of governing church policy could result in a lack of social support. The Church can strengthen social stability and productivity and other forms of human capital. Its social doctrine formulates the principles of human relationships. According to its tradition, the social doctrine's main provisions are contained in the Roman Catholic encyclicals. Social Catholicism has many sources, as a movement aimed at solving economic and social problems during industrial revolutions in Europe.

The Catholic points of view on migration, urban disorders, dechristianization of the working class, prison conditions, and effectiveness of traditional charity have played a great role in the emergence of social catholicism. The most influential figures in social catholicism were: in France – Jean-Paul Adam Villev-Bargemont, Antoine Frederic Ozanam, Frederic Le Place, and Arman de Melen; in Germany – Franz Josef von Busse, Adolf Kolping, Wilhelm Emmanuel von Ketteler; in Italy – Carlo Maria Curci, Matteo Liberatore, and Luigi Taparelli d'Azeglio.

The Catholic social reformism has its way in each country.

In Germany, industrialization began in 1790-1800 and lasted until 1914. The German Catholics relied on an alliance with public services in the sphere of care of poor [6]. Prussian and Bavarian social assistance acts reflected the Catholic Church's solidarity and the State in the sphere of social and human capital support. For example, in the Prussian Civil Book of 1794, there was stated that privileged corporations that had a special fund to support poor people should support disabled members of their family under the statute of these corporations. Step by step, the Church has become integrated with the European states by developing new forms of representation of their interests in social protection.

Later the Catholic Church had got an opportunity to represent its interests in political parties. Thus, among the members of

the European political parties were those who struggled for social security and economic rights at the legislative level [7]. The Church activity led to the adoption of many social laws, such as laws on mandatory social security, on the protection of labor rights.

The encyclicals as sources of the Catholic social doctrine have justified the social security principles such as human dignity, support for the community, public welfare, and solidarity. As for social security, the Catholic social doctrine had a special meaning on state policy. It considered society a single body and all parts of society (social classes) as a part of this body that aimed at achieving social security tasks. The theory of institutional complementarity ensuring social security is still being developed in the Catholic Church encyclicals.

The example of the German Church struggle in the sphere of social and economic protection influenced Austria. The contribution was made by Karl Lueger, the leader of the Christian Socialist Party.

At the beginning of XX century in France, the next stage of a social state called the "golden age of institutionalization" has begun to develop [5]. The main person of this period is Leon Bourgeois, the founder of the concept of solidarity. He believed that the state must guarantee social protection, including labor rights, the standard of living, and protection from unemployment, sickness, and old age. His ideas were further developed by Charles Gide, the social and economic scientist and the supporter of Christian socialism. The period of institutionalization is marked by the creation of the social state in France. At that time, paternalism policy dominated in France; and it was based on the ideas of social catholicism [8].

The modern German and French social systems in such spheres as social expenditure, health insurance, family policy, poverty reduction, and pensions, have shown that the French model better protects citizens from poverty. At the same time, the German system is characterized by a higher quality of management; it is simpler and more predictable and better for disabled citizens [10].

In the XX century, there was a sharp question about the canonical church's status in Italy. The relations between the Church and the State were regulated by the Concordat of the XVIII century made in the church's interest.

Before the national state was created (in 1871), the main form of Italian social protection was charity under the Catholic Church's control. The Church was the first institution that responded to the "worker's problem": it issued a social doctrine in the encyclical "Rerum Novarum" of Pope Leo XIII in 1891. The Church affirmed the priority of private property, family (independent of a state interference), and decent work. It called for solidarity between people and proposed establishing the professional corporations that would unite (as in the Middle Ages) workers and employers [9]. The sphere of social policy was divided between the State, which had little support, and was rapidly losing its authority because of a crisis, and the Church, which organized a mass Christian socialist movement [9].

The real situation required some changes. The reforms concerning the state liberalization have implemented the following norms: granting some rights to denominations (1853); greater punitive measures for priests who interpret state laws freely or who urged to riots, disobedience, and rebellion

(1854); abolition of state subsidies for religious needs. During these reforms, the model of the relationship between the Church and the State as “a free church in a free state” was proposed. According to this model, the Church is obliged to obey national acts. The Church’s sphere of responsibility includes teaching, the appointment of bishops, and the chapel’s right.

Two elements give the confessional character of social state formation in Italy: 1) the idea of creating a social system based on the corporate principle of solidarity as the basis of a harmonious society (this idea was presented in the early Catholic social doctrine); 2) the principle of subsidiarity governing the state intervention [2].

A new transformation of the social, cultural, scientific, and economic paradigm of the European countries begins in the XX century.

The encyclical of Pope Pius XI “*Quadragesimo Anno*” of 1931 played an essential role as it has formulated a basic direction of the European system such as subsidiarity and corporatism.

The subsidiarity is obliged to solve the following problems: 1) protection of individuals’ rights and freedoms; 2) effective regional governance; 3) increasing of state responsibility.

The necessity to find an alternative between the models of the social and economic structure has led to corporatism, where citizens are organized in the guild and associations, as a way of creating a model of social and economic relations [10].

Thus, the Catholic participation, which was caused by both the objective conditions of capitalism development and the beginning of social doctrine formation, determined the church’s attitude to social and economic problems in the modern world [11]. The Catholic doctrine recognizes the existence of social laws that are difficult to eliminate [11].

However, the Church thinks that a person can adjust such laws (as a creature with free will). The basic principle used by the Church is the following: economic and social phenomena or categories should be analyzed for compliance with Christian social concepts and their impact on society.

The Second Vatican Council (1962–1965) confirmed the principle of “autonomy and independence of the Church and the State” established after World War II. However, autonomy does not mean isolation [10]. The benefit of the people is a link for cooperation between Church and State [12].

Besides, Declaration No 11 of the Treaty of Amsterdam of 1997 set out the European Union’s respect for churches and non-confessional organizations under national law. It has formally recognized the religious concerns for the first time at the European Union level. The relations between the Church and the State fall within the domestic competence of the European Union Member States [13]. However, Member States are obliged to respect the fundamental rights guaranteed in Article 9 of the European Convention on Human Rights, such as the freedom of thought, conscience, and religion.

Article 17 of the Treaty on the Functioning of the European Union of 2008 stated:

1) “The Union respects and does not prejudice the status under national law of churches and religious associations or communities in the Member States.

2) The Union equally respects the status under national law of philosophical and non-confessional organizations.

3) Recognizing their identity and their specific contribution, the Union shall maintain an open, transparent and regular dialogue with these churches and organizations”.

The social policy is one of the most important components of any country’s domestic policy; it regulates social relations and is the central question of the responsibility of the government of each state [13].

In recent decades, forming a unified social policy of the European Union has become increasingly urgent. Until now, social policy in the process of European integration has been given secondary importance compared to research on its political and economic aspects.

In respect of social security, several documents play an essential role on the state level:

- Charter of Fundamental Rights of the European Union of 2000;
- European Social Charter made under the auspices of the Council of Europe, adopted in 1961, revised in 1996;
- Community Charter on Fundamental Social Rights of Workers of 1989.

Thus, the European Social Charter includes fundamental rights in the social policy in general [1] (health, social security, welfare), and specifically, in the sphere of employment and industrial relations, including the right to work, to just conditions of work, to fair remuneration and to organize and bargain collectively.

Article 34 is the primary guarantee for social security and social assistance in the Charter of Fundamental Rights of the European Union, 2000. It requires the European Union to recognize and respect entitlement to social security and the right to social assistance. It entitles everyone to reside and move legally within the European Union to social security and social advantages under Community law and national laws and practices.

Thus, nowadays, the European countries have moved beyond a purely legal understanding of European social integration, they try to reflect its spiritual and ethical perspectives, to promote civil society participation in the social integration process.

3. DISCUSSION

The question of the transaction between the Church and the State in the sphere of human capital protection is described in Russian and foreign literature. This topic is determined by the dynamic development of the economics (national and global), globalization, which has strengthened the economic and social interaction of states [14].

However, at the same time, globalization has not contributed to the growth of the equality of its participants and the creation of public welfare in all states [11].

Various social policy models depend not only on the economic development period but also on the inevitable occurrence of new aspects like modern social state [8].

The social state is not changeless. It is in permanent movement, and it changes conditions constantly, so the concept of welfare state needs reexamination. Divergences in the approach to the social protection models begin with the contrast between economic development and social policy and the scope of state social functions [10]. There are supporters of minimizing the

state's role in economics; they believe that state economic development will improve the social situation.

Hence, historical experience shows that most poor people cannot overcome economic hardship without state support.

Most researchers agree with the opinion that the need for it reveals definite signs of such cooperation.

R.N. Lunkin writes about the relationship between the European Union and the Church. According to his views, the religious topic is poorly represented in the European Union activities.

On the one hand, it can be noted that the church influence in political decision making is practically invisible, while secular politicians do not take into account the religious factor.

On the other hand, there are many similarities between the Catholic Church rhetoric and European Union values expressed in the secular language as part of the discussion of the "spiritual dimension of Europe" and the "European soul". The Church spreads its values through its hierarchy and believers, as well as through the advisory and cooperation units, maintaining the political order of the European Union [15].

P. Yarotsky studies the development of modern Europe on an example of cooperation of the Vatican and European Union; he concludes that at the present stage, there is still active cooperation of the Catholic Church and state organizations of the European countries, European Parliament and Council of Europe. This cooperation also allows analyzing the place and the role of a person during European development [10].

S. Carrera and J. Parkin point out such a peculiarity of the development of relations between the European Union and the Church: quite a weak legislation concerning the relations between the Church and the European Union. For example, the European Union legislation and policy do not even have a generally accepted definition of what "religion" means. Despite the absence of key concepts, however, the cooperation fields include 1) citizenship and fundamental human rights; 2) non-discrimination; 3) immigration and internal affairs; 4) social protection; 5) education and culture [16].

4. CONCLUSION

The integration of the European states and the Church in the social security sphere began in the XIX-XX centuries. State and church began to interact as independent social and political institutions.

However, these institutions' objectives were the same: the support of social stability, peace, human life, and dignity.

A unique role belongs to the first encyclical, "Rerum Novarum" of Leo XIII (15 May 1891), which revealed modern social problems, analyzed the role of various social institutions.

This encyclical became the Vatican's first attempt to construct a framework for understanding the relationship between Christianity and the contemporary political, economic, and social state institutions. It tried to applicate the Catholic ideas to modern political and economic models. Moreover, it can be regarded as the socio-political doctrine of Leo XIII and his attempt to bridge the gap between the Church and the modern world.

In the late encyclicals of the Roman Catholic Church, the principle of solidarity of social institutions in the sphere of social support is revealed.

Since II Vatican Council there is a series of papal encyclicals: encyclicals of John XXIII ("Mater et Magistra" of 1962; "Pacem in Terris" of 1963), Pope Paul VI ("Populorum Progressio" of 1967), and Pope John Paul II ("Laborem Exercens" of 1981; "Sollicitudo Rei Socialis" of 1987; "Centesimus Annus" of 1991). They contain thoughts on the conflict between labor and capital, development of the theory of social conflicts, the relationship between state and property, problems of state regulation of the economics, problems of wages (and distribution), trade union movement, "phenomenon of consumerism" [13].

The cooperation between the Church and the European states has reached a new level; that is why it has acquired a new organizational and legal form. The theoretical and legal basis of this cooperation consists of legal acts of the European countries regulating the legal status of the church, such as declarations, European Union treaties, and encyclicals. In social encyclicals, solidarity in social security is revealed.

The European states come across the same problems in the social security sphere with which the Church deals. Efforts to overcome the economic crisis in Europe show that it is impossible to consider any social policy apart from others.

The sphere of social policy and social security, organized at the national level, is influenced by general European problems. It requires the church's participation in discussing such problems with the governments of the European Community.

The purpose of this cooperation is not only political, but it is maintenance of social security, regulation of relationships that are stated in the encyclicals of the Catholic Church.

Principles and tasks of the Catholic Church and the European states in the social sphere coincide with each other; they require the development of various forms of integration of social and political institutions. It seems necessary to find out touchpoints for interaction between Church and European states in the social process and expand an organizational and legal basis.

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