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## CHRISTIAN DEMOCRACY AND WELFARE

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### Abstract

Early Christian-democracy derived its strength and inspiration from the social doctrine of Catholic *magisterium*. Defined as a third way and a centrist doctrine, Christian-democracy has to reconcile its history with the modern position of popular parties of the right wing. In other words, the old plea for the betterment of the lesser-off may be understood as an incipient form of welfare. Secondly, there should be a match between early meanings of welfare and present distributive policies. The aim of this paper is to revisit social founding encyclicals to delineate a Christian-democratic particular vision on welfare. The main contention is that Christian-democracy has built in autonomous principles of welfare, charity and care for the lesser off.

*Keywords:* welfare, social policies, Christian-democracy, social orders, positive right

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### 1. Introduction: Early history of Christian-democracy

Since its inception, conventionally dated in 1891, Christian-democracy as a political ideology and social movement drew different views on its identity and core tenets. The issuance of *Rerum Novarum* encyclical (1891) is largely seen as birth certificate of the social doctrine of Christian-democracy, although prior to the encyclical of Leo the XIII there were incipient forms of Christian activism and organisations, both social and liberal. The main question of Pope Leo XIII in *Rerum Novarum* was “what part the State should play in the work of remedy and relief” taking into account the misery of the working class. A simplified answer is concentrated in the concluding paragraphs: “among the several purposes of a society (...) one should be to create a fund out of which the members may be effectually helped in their needs, not only in the cases of accident, but also in sickness, old age and distress”. These lines bear striking resemblance to classic definitions of present welfare states, as the one adopted by Nicholas Barr and endorsed by Gosta Esping Andersen: the welfare state is “mainly a collective piggy bank designed to insure against social risks and therefore not a vehicle for equality” [1].

The legacy of *Rerum Novarum* on the social doctrine of Christian democracy is revealed in subsequent anniversary encyclicals like *Quadragesimo Anno* or *Centesimus annus* of Pope Pius XI and, respectively, John Paul II.

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But it also enjoys a perennial influence on the so-called ‘social question’, the distributive justice and social policies for the working classes comprised in catholic *magisterium*. The aim of this paper is to reconsider the main social encyclicals of the most political popes in order to underpin a Christian democratic vision on welfare and poverty relief. While it remains true that popular parties are usually defined as inter-class and inter-confessional, the Christian bequest cannot be left aside and there is a natural urge of coherence between past and present founding principle. For example, sickness and old age are commonly included in modern welfare as typical life course risks.

Although a common caveat for the scholarship of Christian democracy is its non-monolithic nature and the absence of a unique programme [2, 3], part of the research reduced its inherent diversity to more or less accurate labels. For this reason, as early as 1949, Malcolm Moss defended Don Luigi Sturzo as a genuine Christian democrat and not a clerical socialist, and argued that the clerical socialism is a plain misnomer for the founder of Popular Party in Italy [4]. A related opinion concluded recently that present Christian democracy dissolved into a type of social democracy, again declining its distinct nature [5]. A third view defined Christian democracy as a subtype of conservatism, as did Malcolm Macdonald in an article which distinguished between an American and English experience of conservatism and a Continental variant in the form of Christian democratic parties [6]. Conservatism and Christian democracy share the cornerstone value of religion and the underlying suppositions on human nature as ‘a religious being’ [7], but nonetheless they depart on matters concerning distributive justice, progress or readiness for social change.

Not only there were the early alliances of popular parties, in Italy and France, with the left parties, but also witticism of well-known members contributed to a feeling of bafflement. When Georges Bidault reflected of the Popular Republican Rally in terms of “being in centre and doing left politics with the electorate with right views”, he gave a tentative expression for ‘the third way’ of Christian democracy, but still objectionable [3, p. 23].

The overlapping origins of Christian democracy contributed equally to family resemblances among popular doctrines rather to a straight canon of ideas and principles. The sources of inspiration for Christian democracy combined the church *magisterium*, the philosophy of Thoma of Aquinas with the works of founding figures, like Don Luigi Sturzo, Emmanuele Mounier or Jacques Maritain, to cite only a few. The main values and tenets of Christian democracy are usually the quest for common good, personalism, decentralisation and/or subsidiarity, societal corporatism and social market economy, the refusal of communism and Marxist revolution. Although most of popular parties are now on the right side of the spectrum, the original self-positioning was in the centre, a middle way between revolutionary socialism and liberalism.

A short review of definitions assigned to Christian democracy brings no clear-cut constraints on a specific type of welfare and social policy. Don Luigi Sturzo reflected on the modern democracy along three lines: unconditional support for democracy, political freedom, the importance of parliaments and

separation of powers and ‘social justice so as to avoid the economic exploitation’. But this is only a formal scheme and the founder of Popular Party in Italy points to personalism, pluralism and institutionalism to complete the political thought of Christian democracy [8]. In a rather similar vein, Gabriel Almond stressed the key concepts of solidarism, personalism and pluralism as general traits of Christian democracy. Secondly, his minute analysis showed that European Christian parties of the 1930s differed markedly in respect to proposed economic and social reforms (corporatism, Christian socialism and liberalism) [9]. Recent accounts on Christian democracy dissolved its identity into a typical western form: “a mixture of social democracy based on a certain degree of equal access to the consumer goods produced made available by the affluent society, and on the individual and social rights produced by the astonishing growth of the regulatory powers wielded by the state” [5].

While the idea of equality and equal access to goods remains unaltered, the supposition of ‘affluent’ society no longer holds and recent waves of recession and austerity measures impose rethinking of social policies and affordable welfare. The structure of this paper is intended to be a conceptual digging into the past teachings of papal encyclicals in order to outline what remedies for social risks would match a coherent approach for welfare. In the topography of papal thought, the reflections of Leo XIII, Pius XI, Pius XII and John Paul II are deemed ‘more political’ than others and the foci rests with the encyclicals of these, namely *Rerum Novarum* (1891), *Quadragesimo Anno* (1931), *Mater et Magistra* (1961), *Pacem in terris* (1961), *Populorum progressio* (1967), *Octogesima adveniens* (1971), *Laborens exercens* (1981) and *Centesimus annus* (1991).

The second aim is to bridge doctrine of social encyclicals with current distinctions from mainstream literature of welfare. This amounts to distinguish between the responsibility of state and nonstate organizations for the betterment of the lesser off, the social risks mentioned in papal teaching and what type of redistributive policies are recommended according to the Church precepts. The exposition is chronologically and it is followed by a synthesis of conclusions. The main contention concerns a specific vision on welfare and social policies inside Christian democracy, quite different from the view of a middle way between socialist and liberal perspectives.

## 2. Charity, welfare and the ‘social question’

The social doctrine of Catholic Church conventionally began with the ‘worker’s Pope’, Leo XIII who laid down its principles amidst revolts and growing appeals for socialist ideas in Italy. The aim was to address the so called ‘social question’, meaning the “imbalance (...) between participation in the production process and entitlement to an income that ensured an acceptable standard of living” [5]. The term ‘imbalance’ used by Paolo Pombeni is slightly euphemistic because the third paragraph of *Rerum Novarum* acknowledges the

miserable and wretched condition of the 'majority of the working class' but also is keen to depart its message from the socialist radical solution.

Assuming as general principle 'the law of nature', the first part of the encyclical rejects the socialist appeal to community of goods on grounds that it conflicts the inviolability of private property, and also refutes clearly the Marxist idea of inter-class warfare. Religion appears to be a cohesive thrust for labour and capital because it reminds each other their duties and obligations of justice. Among these, there are different duties of employer and worker, and also mutual duties that are meant to bound the two classes, such as to respect in every man his dignity of person ennobled by Christian character [10].

The betterment of the lesser off and the welfare of working class are treated separately in the remaining part of *Rerum Novarum*, according to who bears the responsibility. For analytical reasons, I suggest that the second part of the encyclical can be divided into four sections of Christian precepts for poverty relief: personal duties, the Church role, the State part and the mutual organisations. The first two are highly intuitive and here Pope Leo XIII reminds the duty of Christian charity – "Of that which remaineth, give alm", and stresses the importance of education because virtue understood as Christian morality "when adequately and completely practiced, leads of itself to temporal prosperity" [10, para. 28]. The last two institutions, the State and mutual organisations, received a more detailed discussion but there is no sign of attaching to them a higher status. The assumption is that each of them is necessary for the results, since 'all the causes cooperate', but in the same time none seems sufficient for changing the wretchedness of the poor.

Public well being and private prosperity are the first duty of the state and laws and institutions are to serve only the purpose of common good. It is worth noting the explicit teleologism and the premise of equal consideration of interests in the distributive justice according to *Rerum Novarum* [10, para. 33]. Many social questions are related to the state's duty "to promote to the utmost the interests of the poor": unjust burdens, endangered health by excessive labor, insufficiency and/or unfairness of wages, protracted labor hours, rest from labor. In each of these cases the state should sanction abuses and protect the rights of the needy. The encyclical does not provide straight recommendations on these issues of the welfare of wage-earners but sets a general principle that "the law must not undertake more, nor proceed further, than is required for the remedy of the evil or the removal of the mischief", which is reminiscent of Aristotle's median golden rule of the proportion applied to social problems [10, para. 36].

Last but not least, the final paragraphs of *Rerum novarum* built up the existence of mutual organisations, such as benevolent foundations, trade unions, and associations consisting of workmen and employers. These lesser societies may derive strength and inspiration from the model of ancient guilds which took care of their members in temporary distress. The welfare benefits provided ideally by non-state means are quite instructive to list, *i.e.* support for workman, widows or orphans, and in case of calamity, sickness, or in the event of death.

The state should only encourage the existence of such associations without interference, except situations where their purposes are dangerous or unlawful.

### **3. Subsidiarity of welfare**

Forty years later, Pius XI celebrated in *Quadragesimo Anno* (1931) the issuance of *Rerum Novarum* as the foundation of a true Christian social science, and both contributed in different ways to the corporatist stance of the papal social doctrine. The corporatism implied has nothing in common with the statist experiences of fascist corporativism, as it only praises associations of workmen and employers and both encyclicals express the desire that “they should become more numerous and more efficient” [10, para. 49; 11].

But first and foremost, *Quadragesimo Anno* is reputed for the principle of subsidiarity, now a basic ingredient of European polity, referred to in the prologue of Maastricht Treaty. The original coining of the ‘subsidiary function’ concerned the fostering of ‘lesser societies’ so much praised by Leo XIII. Therefore, the ideas of *Quadragesimo Anno* take as starting point a principle of social philosophy which asserts that “it is an injustice and at the same time a grave evil and disturbance of right order to assign to a greater and higher association what lesser and subordinate organizations can do” [11, para. 79]. The short quote reveals also an authentic contribution of Pope Pius XI to the corpus of political principles, namely the concept of “orders” (*ordo, ordines*) [2]. The term occurs in quite different phrases, such as the ‘universal order of purposes’, “economic and moral orders”, but its distinctive meaning is originated in Thomas of Aquinas, who defined order as “unity arising from the harmonious arrangement of many objects”. In similar vein, there is a social order which “demands that the various members of a society be united together by some strong bond” and this unity comes from the ideal of common good as opposed to private or own interest [11, para. 84].

The question of welfare is closely related to a stable social order and one assumed objective of *Quadragesimo Anno* was to develop the teachings of Leo XIII, not only to recall and defend them. A marked continuity is shown in the harsh criticism of both communism and socialism, also in the premise which deplors the unjust inequality in the distribution of goods. The first part of the encyclical is intended to record the effective and practical influence of *Rerum Novarum* on workmen, laws, statesmen, and associations, including trade unions. The second part broadens four themes of the social and ethical doctrine under these headings: the equitable distribution of property, the issue of just wage, the reform of institutions and the correction of morals.

From the twofold nature of ownership, individual and social, it follows that the common good requires a more just distribution of goods in order to avoid the uncertainties and scanty lives of non-owning workers. Although the term “just” remains vague, the disquieting tendency for pope Pius XI seems to be “the huge disparity between the few exceedingly rich and the unnumbered

propertyless” [11, para. 58]. A possible implication of this position may be the modern plea for a minimal standard of living.

The second theme indirectly related to welfare is the right assessment of wages and salaries. Three preconditions are identified in the encyclical *Quadragesimo Anno* for the just correlation between work and pay: the wage of the worker is sufficient to support him and his family, the condition of the business is stable and the wages are adjusted to the public economic good. The last requisite amounts to the idea that “excessive lowering of wages, or their increase beyond due measure, causes unemployment” and an ordered society should prevent this for the sake of common interests of capital and labour. A more visible profile of modern welfare stands out in the discussion of laws inspired by the legacy of *Rerum Novarum* and here “the protection of life, health, strength, family, homes, workshops, wages and labor hazards” and the betterment of “the condition of wage workers, with special concern for women and children” are cited with hopeful approval [11, para. 28].

#### 4. The centenary sequel

While Pope Pius XI did not hesitate to call *Rerum Novarum* the Magna Charta of social doctrine of the Catholicism, after a century from its release Pope John Paul II referred to it as an “immortal document” [12]. *Centesimus annus* was issued in May 1991 in order to celebrate and also to re-read ‘the new things’ and propose fresh perspectives on the evolution of catholic magisterium. The anti-marxist thread is picked up again by Great John Paul II, who is right to stress the prophetic message of Leo XIII in a time when socialist solutions to the question of workers were merely an idea stirred up by the radicals in front of the workers. The collapse of communism and its history fully entitles His Holiness to judge in retrospect that “the remedy would prove worse than the sickness” [12, para. 12].

The doctrine of the Church on social issues is reframed by John Paul II in terms of social rights and solidarity. It is the dignity of the worker which ensures his rights to private property, to form private associations, to limitation of working hours and legitimate rest, to a just wage, and to discharge religious duties. The relief of poverty and the protection of the poor are required by the principle of solidarity, which means “defending the weakest, by placing certain limits on the autonomy of the parties who determine working conditions” [12, para. 15]. This represents a direct intervention of the state, apart from its indirect influence under the principle of subsidiarity, which ensures the most favourable conditions for economic growth. The encyclical highlights the proactive roles of the Church, volunteer work, and trade unions to alleviate wanting conditions but assign the burden of responsibility with the State. Pope John Paul II reckons that the proper scene of the social rights is no longer the civilised West, except the sick and the elderly, and the social objectives of *Rerum Novarum* should be properly placed, at the time of His writing, in Third World contexts [12, para. 35]. A short note finds its place here, because the encyclical reveals a new

mission for the State in present capitalism, the duty to defend the collective goods which “constitute the essential framework for the legitimate pursuit of personal goals on the part of each individual” [12, para. 40].

Rather unexpectedly, the question of welfare suffers mild criticism when the modern ideal of welfare state proved tantamount with ‘Social Assistance State’, an abusive way to perform the functions of modern welfare. Here again, the unsuccessful attempt to remedy the needy are explained by means of ignoring the principle of subsidiarity [12, para. 48].

The ‘new things’ which seems to absorb the Pope changed substantially and the moral issues of capitalism, the right to life and new experiences of alienation are receiving the bulk of consideration. Nonetheless some parts of the world are still striving for benefits, welfare and social rights as envisaged by Catholic magisterium.

## **5. Conclusions**

The evolution of the social teachings comprised in the aforementioned encyclicals reveals a rather tortuous path from the primacy of concern for the condition of workers and lesser off to a deprecating reference to abuses of welfare state. The main foci of classic magisterium were the risks and uncertainties of non-owning workers. The mainstream literature on welfare uses the distinction between life-course risks, inter-generational risks and class risks [13]. The papal social recommendations have addressed first of all risks which impose horizontal redistribution, such is the case with class risks of particular social groups and life-course risks, for example policies for old age infirmity. But also vertical redistribution was included into the social doctrine even since *Rerum Novarum*, as a consequence of gloomy life chances for children. Nevertheless new risks emerged in the recent decades and here Pope John Paul II rightly anticipated the challenges and present ordeals of immigrants and refugees [12, para. 48].

In respect to major economical solutions, social market economy of German Christian democracy replaced the old societal corporativism of Leo XIII and Pius XI, but its legacy is hardly extinct. The current social dialogue and tripartite committees of trade union representatives, owners and state officials are a direct result of the proposed partnership between workers and owners as a means to solve the wage-earning question. The work contract was not supplanted by a partnership contract, as Pope Pius XI deemed “advisable”, and employers did not become “sharers in ownership or management” [11, para. 65], but their voice is given a round table to be heard and an arbiter to judge their grievances in the person of state.

The paradox of welfare policies which stems from the evolution of social magisterium may be understood using the opposite terms of deficiency and excess of Aristotelian golden rule. The society should avoid the frugality of livelihood of each person, for this deficiency is against social order and social rights. But also the excessive welfare policies can damage the common good, if

they are not observing the subsidiarity principle. As John Paul II expressed it, a just society should prevent “the sphere of State intervention to the detriment of both economic and civil freedom” [12, para. 48].

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