SOLIDARITY

AS A COMMUNION AND BROTHERHOOD
OF WORKING PEOPLE

EDITED BY
WŁADYSŁAW ZUZIAK
AMADEUSZ PALA

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From the editors

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With this volume, we offer you the second installment in the series "The Idea of Solidarity Today," which is the result of the international scientific conference entitled *Solidarity as a Communion and Brotherhood of Working People*, held on November 19–20, 2021. The purpose of the conference was to recall the idea of solidarity and to analyze it in international terms, taking into account contemporary realities. The event was organized by the International Center for Study of the Phenomenon of Solidarność (MCBFS), a research unit established by the Independent and Self-Governing Trade Union "Solidarność" and the Pontifical University of John Paul II in Krakow, working in cooperation with the Pontifical Academy of Social Sciences in Rome.

The idea of solidarity, which was solidified more than forty years ago by the testimony of Polish workers and the Solidarity Trade Union, opened a new chapter for labor movements by bringing about the collapse of Marxist ideology. Today, however, it requires a deepening and creative development to reflect the political and economic changes that have taken place in the world since August 1980 and to maintain its relevance.

A modernized understanding of the idea of solidarity, expressed in light of Catholic social teaching, can contribute to solving the crises faced by working people around the world. The diagnosis of these crises is not yet complete — it is enough to see that the modern community of workers has been largely divided. New forms of labor increasingly isolate a growing number of workers, abandoning them before a free and frequently manipulated market. International regulations on tariffs and trade have the effect of globalizing capital and trade, while the defense of workers' rights remains at the national level. As a result, big business can easily shift jobs to countries that offer low wages, low levels of rights protection, and no respect for workers' dignity. The existing situation can be compounded by additional difficulties,

such as those associated with pandemics or war. These contribute not only to the disruption of the labor community but also often strip working people of their subjectivity.

In response to the challenges cited above, a valuable proposal seems to be the postulate to universalize the Polish experience of solidarity and revive its spirit. This revival should not be limited to the local or national levels but rather be implemented in a global dimension, so that the value of the dignity of the working man is universally recognized. In this way, all participants in economic life will have the chance to obtain justice and fair wages.

The emergence and development of Solidarity in Poland were made possible by strong Christian inspiration and Catholic social teaching. In the modern day, the Church continues to respond to the challenges of modern times. An example is Pope Francis' encyclical Fratelli tutti, which in recent years has been a major advocate for the poor, marginalized, and excluded.

When referring to the role of Christianity in the formation of the Polish experience of solidarity, the vital role that the Eucharist played in the lives of the working people should be emphasized. The Eucharistic experience of communion influenced the Polish experience of solidarity, as well as the building of community and fraternity between first workers and then between members of different social and professional groups. It was a community beyond divisions and beyond the particular interests of individuals.

* * *

The book begins with the Foreword, which was authored by the Archbishop of Krakow, Marek Jędraszewski — Grand Chancellor of the Pontifical University of John Paul II in Kraków, and Mr. Piotr Duda, President of the Independent and Self-Governing Trade Union "Solidarność."

The first article is entitled: *The role of solidarity in the quest for the sustainable improvement of the material and spiritual living conditions of people and planet earth.* Its author, Archbishop Marcelo Sánchez Sorondo, Chancellor of the Pontifical Academy of Social Sciences, emphasizes the role of solidarity in overcoming the problems facing the modern world, especially concerning issues of hunger, marginalization, climate change, consumption, pandemics, and new technologies.

In the second text, *New forms of solidarity in the light of John Paul II teachings,* Stefano Zamagni seeks to provide a sense in which to speak of the new forms of solidarity. The author focuses on Pope John Paul II's essential contribution to modernizing and expanding the reach of Catholic Social Teaching.

In his article *On the globalization of the idea of Solidarity*, Rocco Buttiglione conversely stresses that the Polish trade union Solidarnosc introduced the idea of a moral society, which includes a critique of not only communism, but also of unrestrained capitalism. The author stresses that the fall of communism did not mark the end of history, but rather the beginning of a search for new and more dignified ways of life for working people.

In another article, *The rise of the philosophy of Solidarity in Poland*, Władyslaw Zuziak points out that the rise of the Polish Solidarity movement has its origins in biblical inspirations. These — in the formation of the ethos of solidarity — came under the influence of Karol Wojtyła and Józef Tischner. The author outlines the development of the moral philosophy of solidarity in the early period of the movement's formation and discusses the reasons for its later departure from the ethos of solidarity. He concludes by showing both the shortcomings of contemporary models of solidarity and the prospects for the development of the project of solidarity in a universal dimension.

The next author, Marek Rymsza, points to another dimension of the problems connected to global solidarity in his text *From a social issue to an ecological issue*. By looking at the ongoing transformation of the energy model in Europe from a sociological perspective, he addresses the problem of energy and climate policy. He proposes linking it to a model of integral ecology that allows for systemic change, thereby breaking through contemporary consumerism and technocratism. This model is intended to be a comprehensive solution: while lowering the costs of economic development, it also sees an increase in social benefits.

In his article entitled *Solidarity in social insurance on the example of the Polish pension system,* Marcin Zieleniecki analyzes the elements of social solidarity and its understanding of social insurance through the example of the reformed pension system in Poland. The subject of the analysis consists of the various methods of financing pension benefits, the construction of pension risk, the conditions for acquiring the right to a pension, and the formula for determining a pension's amount. These issues are critical problems confronting Europe's aging societies.

In the last article *The triple threat of artificiality*, Gustavo Beliz points out the further threats to the labor market associated with the virtualization of social reality. Among the most important of these, the author examines issues related to artificial intelligence, artificial wealth, and artificial ethics. He argues that countering these problems could be possible with the globalization of workers' rights and multilateral initiatives to harmonize labor regulations and standards between countries.

Rev. Władysław Zuziak
Amadeusz Pala

Foreword by Metropolitan Archbishop of Krakow

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At the beginning of this Foreword, I would like to thank all the participants of the International Conference "Solidarity as a Community and Brotherhood of Working People" for their participation, as well as for their contributions to the development of the idea of solidarity—which is close to our hearts. I would also like to thank the conference's organizers: the Pontifical Academy of Social Sciences and the International Centre for the Study of the Phenomenon of Solidarity, which is a research center composed of two entities: the National Committee of the Independent Self-Governing Trade Union "Solidarity" and the Pontifical University of John Paul II in Krakow.

The conference is an important event due to the message and topicality of the idea of solidarity, which assumed a physical form in the testimony of the Polish workers 41 years ago. The Solidarity movement of the working people, which was founded at that time, was a new chapter in the history of labor movements in Poland and abroad. By opposing the Communist system in 1980, the workers, who regained themselves and their dignity, contributed to the collapse of Marxist ideology and, a few years later, in 1989, to the fall of the Berlin Wall.

In the "Solidarity" movement, the most important values of the members—human subjectivity, the sovereignty of the whole nation, and faithfulness to tradition—were inextricably linked with Christianity. It should be emphasized that the source of solidarity was a community of values that surpassed any political divisions. This community, which was rooted in the Christian tradition of the nation and in the values that emerge from the Gospel and from truth, has remained for us an important goal.

The phenomenon of "Solidarity" found its source in the hope its members placed in God. The Eucharist, which is the wellspring of Christian life, played

a significant role in the formation of the Polish experience of solidarity among the working people. The photos of the Gdańsk Shipyard taken in 1980 amazed the entire world and defied the Marxist dogmas that claimed the working class had renounced God. They bear witness to the truth in the best viable way. The experience of Eucharistic communion in the Shipyard had an impact on the Polish experience of solidarity, on the formation of community and fraternity among workers, as well as among members of various social and professional groups. It was a community beyond divides and the particular interests of individuals.

In September 1981, during the First Congress of "Solidarity" in Gdańsk Oliwa, the Program of the Independent Self-Governing Trade Union "Solidarity" was established. It emphasized that the new movement was inspired by the values of Christian ethics, national tradition, and the democratic tradition of the world of labor. In the Program, one could read that the Union emerged from the rebellion of Polish society, whose human and citizen rights were continuously violated, and that its main goals were freedom, justice, democracy, truth, and human dignity. Based on those values, "Solidarity" was to become a "movement of the moral rebirth of the nation." It is worth recalling one of the postulates of the aforementioned Program: "Respect for a human must be the fundament of any action. The state is to serve the human being, and not to rule over him."

After the political and economic changes that have taken place in the world in the years following August 1980, the idea of Solidarity undoubtedly needs to be rethought. A deeper and renewed understanding of the idea of solidarity, expressed in the light of Catholic social teaching, still has the immense potential to solve the crises that working people are struggling with all over the world. It is worth remembering that the movement of Solidarity was directed not only against Marxist communism, but also against any form of economy that treats man in a purely instrumental way.

In modern times, when more and more poor people are becoming even poorer, and when the increasingly less — numerous rich are becoming richer and richer, when the fight for respecting fundamental human rights and human dignity is taking place all over the world, it is truly time to renew the idea of solidarity. After years of "the small capitalist stabilization," it is time to awaken the conscience that must hear the cry of the wounded and underprivileged. It is time to shoulder the burdens that are the result of wars, climate

change, and social exclusion, and which the weakest cannot bear alone. In this aspect, the Conference refers to Pope Francis' new encyclical *Fratelli tutti*.

An attempt to universalize the Polish experience of solidarity and renew its spirit during this conference, both in the national and global dimensions, seems to be a fully justified task. It is one that is aimed at reminding all of us that we participate together in the creation of the common good and together, we are responsible for its strengthening and transmission to future generations.

With my pastoral blessing
Marek Jędraszewski
Metropolitan Archbishop of Krakow
Great Chancellor of the Pontifical University of John Paul II in Krakow

Abp. Marek Jędraszewski – a Polish Roman Catholic prelate who has been Archbishop of Kraków since 8 December 2016. He served as the Archbishop of Łódź from 2012 to 2017. He has also been Vice-President of the Polish Episcopal Conference since 2014. He is known for being an orthodox defender of the faith, and is also known for being open to ecumenical efforts and dialogue. His selection for the Kraków archdiocese was perceived as a surprise in some quarters. Jędraszewski then studied philosophy at the Pontifical Gregorian University, where he earned a doctorate. In 1974 he earned a bachelor's degree in theological studies in Poznań, and from 1973 to 1975 served as a parochial vicar at Saint Martin's parish in Odalnów. He received his bachelor's degree philosophy 1977. On 20 December 1979, he defended his doctoral dissertation and Pope John Paul II awarded it a gold medal. From 1980 until 1996, he served in Poznań as an assistant professor and as the prefect of seminarians from 1980 until 1987. From 1987 until 1996, he served as the editor (chief editor since 1990) of the Catholic Guide paper, and in 1996 he did his habilitation degree in Kraków on Jean-Paul Sartre and Emmanuel Levinas. In 1996, Jędraszewski was made an associate professor in Poznań and was also made a visiting professor to the Pontifical Lateran.

Foreword by Piotr Duda, President of the Independent and Self-Governing Trade Union "Solidarność"

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Your Excellencies, Honored Professors,
At the outset, on behalf of the Independent Self-Governing Trade Union "Solidarity," I wish to express my joy and gratitude for participating in this unique event. The International Conference "Solidarity as a community and fraternity of working people," organized by the International Center for the Study of the Phenomenon of Solidarność and the Pontifical Academy of Social Sciences, addresses important questions facing "Solidarity" today with its theme.

I would like to thank the organizers for inviting such unique personages to the various panels. At the same time, I would also like to thank all those who devoted their time to share their experience and knowledge with us. Please allow me, ladies and gentlemen, to begin by offering our perspective on the subject matter of this two-day conference. As a Christian entity, the Independent Self-Governing Trade Union "Solidarność," basing its activities on the social teachings of the Church, is an exception among trade unions, not only in Poland but also in Europe and the world. For us—contrary to the majority of trade unions—the Gospel is the foundation of those values on which we are based and often determines which decisions we should make on specific issues. It also determines the hierarchy we use to approach these issues: from the dignity of the human person to the fraternity of working people, while trying to put into practice the teachings of the Church.

We, the unionists of Solidarity, who are, above all — Christians, are constantly looking for answers on how to conduct our union activities in the spirit of the Gospel and according to the social teachings of the Church. Therefore, when engaging in our numerous undertakings, both within the framework

of the "International Center for the Study of Phenomenon of Solidarność" and various congresses, conferences, and events, we listen to the views of philosophers and theologians, Christian economists, prayer communities, in order to better understand these teachings and practically implement them in our everyday activities.

We live in the times of large and evolving problems that need to be solved. Threats — not only related to pandemics, globalization, the growing power of multinational corporations — but also to the growing revolution of ideologies that are destroying societies, including those composed of working people. Hence, once again, please accept, on behalf of the National Commission, our gratitude for this conference.

Firstly, let me start with a few thoughts from myself, resulting from our experiences, daily practice, and participation in the numerous conferences, summer schools, and meetings which I have just mentioned. The social teaching of the Church, which we learn primarily through papal encyclicals, very clearly delineates the order that should characterize the relationship between the world of labor, employers, the State, and the Church. This was perfectly expressed by Pope Leo XIII in his Rerum Novarum encyclical, often referred to as the encyclical of trade unions, although we more often use the phrase: "the encyclical of collective bargaining." Leo XIII taught us that the place where social stresses arise is found in the relationship between the worker and the employer. It turns out that the main source of problems is not the state, various social movements, or the increasingly prevalent harmful ideologies that are preached today. Despite the fact that communism and fascism were being born at the time of the encyclical's writing, the Pope has nevertheless indicated the relationship between the worker and the employer. In order to resolve these tensions, the Pope taught that it is necessary to have an ongoing dialogue, one that involves constant reminders of both parties' rights and duties.

In Pope Leo XIII's view, the role of the country is to create the conditions and legal framework necessary for such a dialogue to occur and to ensure the maintenance of what the dialogue produces. What place, then, does the Pope allocate for the Church in these circumstances? The Church is to teach one another, workers and employers alike, what moral code and what values are to guide this dialogue. Today, through this conference, we are listening to such teachings. Dialogue, of course, cannot always take place on an individual basis, especially when dealing with large workplaces, and even more

so with large global corporations. Here, it is necessary to have an organized representation of workers, which is precisely what trade unions are. And it is here that the first big problem arises. It is becoming increasingly more difficult, thanks to large multinational corporations, to have an employer in this direct sense — and to put it simply: there is no one to talk to. There are companies and there are employees, but it is impossible to identify the owners and the people who actually make the decisions. Often, these are influenced by unspecified funds, complicated shareholdings, and institutions that are hard to even link to specific companies. What we have here is a dehumanization of employers. What's worse, this has global consequences in the form of phenomena that destroy entire societies. I am referring here not only to cultural and social revolutions but also to a kind of "economy of desires" — global engineering that builds up widespread consumerism, which drives entire communities into slavery to credit, among other issues. We discussed this phenomenon three years ago at the Granada Summer School. In the conclusions formulated there, we pointed out that such phenomena, financed by big international business, can only be opposed by another globalism: the universalism of the Gospel. Only two things are equally universal: workers and the Church of Christ. Hence, we also postulated that an explicit voice of the Church is necessary. A voice that, on the one hand, has the knowledge and wisdom to name these phenomena, assess and point out the dangers, and, on the other hand, to spread them.

„Solidarność" understands the social teaching of the Church in a very practical way — indicating the relationship between employees and employers as a mutual concern. This is a simplification, of course, but it gives a good understanding of the essence. A Christian employee is not only to work honestly; he should also refrain from cheating, not steal, and not work against his employer. He has an obligation to care about the good of the company and to use his talents for the good of the company. In following this line of reasoning, it becomes apparent that intentionally inefficient work is a sin. However, the employer also has an obligation to care for his employee: to pay him honestly, not to exploit him, and not to act knowingly in such a way as to cause him harm. He also has a duty, as far as he can, to take an interest in him and help him and his family outside of work. When there is no employer on the other side of the phone, when there is no one to talk to, when there is no human being behind the company's signboard, it is difficult to talk about reciprocal care.

The relationship between the worker and the employer, from the perspective of Pope Leo XIII as well as our Holy John Paul II, is becoming less visible and sometimes even impossible to realize. If this relationship cannot be defended, or even rebuilt, then these very bad global phenomena will worsen, leading entire societies to experience disaster. The prescription is a creative alliance between the world of labor and the Catholic Church — with its social teachings flowing from the Gospel. A great support here would be another encyclical, that which was written by our Holy Father, Pope Francis, who — in his previous teaching contained in *Fratelli Tutti* — deeply touched on social issues and the dangers of the globalization of indifference. What is needed during these times is a voice against the globalization of the "economy of desire."

Let us pray for such a creative alliance to form, first through the intercession of the patron of the Solidarity Trade Union, Blessed Father Jerzy Popieluszko, as well as the spiritual Father who awakened Solidarity in us — Saint John Paul II.

I sincerely wish you a fruitful discussion, one to which I will listen with great attention. Again, I would like to thank the organizers, speakers, and participants of this symposium. I hope that the materials of this important conference will appear in the form of a separate book publication and will serve those who see the idea of solidarity as a community and fraternity of working people.

Piotr Duda — Polish trade union activist, since 2010 chairman of the Independent Self-Governing Trade Union "Solidarity." From 1980, he was an employee of Huta Gliwice as a turner. In the years 1982–1983, he served in the 6th Pomeranian Airborne Division. He took part in the Polish Military Contingent in UNDOF in Syria. Then, he returned to work in Huta Gliwice. From 1980, he was a member of NSZZ "Solidarność," and in 1992, he was elected chairman of the factory committee. In 1995, he was on the presidium of the Śląsko-Dąbrowski Region management board, and two years later, he became the treasurer of the region's management board. He also became the treasurer of the AWS Social Movement in the Katowice district (he was in the initial period of the party's activity). In 2002, he won the election for the chairman of "Solidarity" in the Śląsko-Dąbrowski Region. In 2006 and 2010, he was re-elected. He also became a member of the National Committee of Solidarity. On October 21, 2010, he was elected the chairman of the National Committee of NSZZ "Solidarność," defeating Janusz Śniadek, who was seeking re-election. In 2014 and 2018, he was re-elected to the position he held. He was also the president of the board of the Foundation for the Health of Children and Youth in the Śląsko-Dąbrowski Region. Grzegorz Kolosa. In October 2015, on behalf of NSZZ "Solidarność," he became a member of the newly established Council for Social Dialogue; he entered the presidium of this institution as one of its seven vice-presidents.

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The role of solidarity in the quest for the sustainable improvement of the material and spiritual living conditions of people and planet earth

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There is certainly a solidarity paradox in the contemporary world. On the one hand, there is so much solidarity exercised by individuals in families, hospitals, schools, and communities, while on the other hand there are huge solidarity deficits between nations and solidarity failures in tackling the global issues of people's poverty, education, and destruction of our planet.

The second paradox is that the world is richer than ever, but poverty persists in the midst of abundance. In this sense too, the world has vast technical knowledge, but technology has brought humanity to the brink of self-destruction, as manifested, among other things, by the climate crisis.

The third paradox is that today, alongside the wealth of material goods, there is an enormous wealth of knowledge that is unparalleled in history and must be made available to all peoples through new and appropriate processes of synthesis and transmission. However, the crisis of education, intensified by the pandemic, means that such knowledge and truths are not enjoyed by the majority.

Fourthly, there is the existential paradox of "mass atheism" or rather the idolatry proposed by mainstream thought that considers the human being the saviour of God and not vice versa. At a time when the grace of Christ is in fullness to be distributed to all men and women in order to realise the fraternity

envisioned by Pope Francis, the materialistic ideology of the "Pensée unique" (French for "single thought") makes governments and many nations forget to ask Divine Providence for help.

With these vast stores of wealth and technology, knowledge, and the grace of Christ, our greatest need is neither more wealth nor more technology but the Gospel project of solidarity expressed above all in the programme of the beatitudes. Concretely, the reason and faith present in Christ's message can teach us to use our wealth, technology, knowledge, and grace to realise solidarity among human beings, the common good, and the safeguarding of the earth.

We must find ways to overcome this micro versus macro paradox of solidarity, which poses a joint challenge for science, social sciences, philosophy and faith. Following Saint John Paul II, Pope Benedict pointed out in *Caritas in Veritate*: "The Church's social doctrine, which has *an important interdisciplinary dimension*,[1] can exercise, in this perspective, a function of extraordinary effectiveness. It allows faith, theology, metaphysics and science to come together in a collaborative effort in the service of humanity."[2]

Solidarity — religious, social, political and philosophical perspectives

Solidarity comes from the Latin "solidus." Solidus means solid, firm. "In solidum" described a debt relationship in which each and all are liable — i.e., there is a binding obligation, a joint debt. In Pope St John Paul II's *Centesimus annus*, the concept of solidarity is elaborated by referring to Leo XIII as "...an elementary principle of sound political organization, namely, the more that individuals are defenceless within a given society, the more they require the care and concern of others, and in particular the intervention of governmental authority. In this way what we nowadays call the principle of solidarity, the validity of which both in the internal order of each nation and in the international order [...] is clearly seen to be one of the fundamental principles of the Christian view of social and political organization."[3]

1 St John Paul II, Encyclical letter *Centesimus Annus*, 59.
2 St John Paul II, Encyclical letter *Centesimus Annus*, 31.
3 St John Paul II, Encyclical letter *Centesimus Annus*, 10.

Solidarity has an intrinsic value — expression of justice, compassion, care, charity — and solidarity is active for the humanisation and development of the singular individual and social human being. In political contexts, "Solidarity" has been used for celebration days in the Soviet Union and for trade union movements in developing countries such as "Justicialism" in Argentina and for other events and organisations. The famous "Solidarność" trade union in Poland confirmed its recognition of workers' rights and freedom.

Associated with the *Frankfurt School*, the German philosopher and sociologist Habermas argues that solidarity and justice are two sides of the same coin, always internal to some concrete community, while universal ethics and justice require detachment from the internal bonds of concrete communities. In Habermas' concept, solidarity is always a partial "we-think" driven by subjective agents, while justice represents an objective, impartial and agent-neutral perspective. However, it should be noted that the perspective of solidarity in *Centesimus Annus* and even more so in *Fratelli Tutti*, i.e., in the Magisterium of the Popes, clearly goes beyond this restricted concept of solidarity as applicable only to a particular, concrete community. This broader concept of solidarity is actually in line with the liberating message of the Gospel, with the Thomistic notion of the law of nations (*ius gentium*), and Kant's concept that all people form a "Kingdom of Ends," derived from the second categorical imperative.[4] According to these views, each individual has rights and duties, and all individuals are neighbours to one another because they are images of God (One and Triune), redeemed by the grace of Christ and children of the same Heavenly Father. Although this may sound utopian, Rawls in our day, like Thomas and Kant, also considers universal duties towards other individuals and their welfare as integral requirements for human rights. This perspective actually overcomes an "us" versus "them" view. Rawls argues for a reconciliation of the principles of freedom and equality that applies to the basic structure of a "well-ordered society" with the Aristotelian idea of "justice as fairness." 'Justice — writes John Rawls at the beginning of *A Theory of*

4 "Act in such a way that you treat humanity, whether in your own person or in the person of any other, never merely as a means to an end, but always at the same time as an end" (Immanuel Kant, *Groundwork of the Metaphysics of Morals,* Translated by James W. Ellington, Hackett. (1993) [1785], p. 36. 4:429. St Thomas Aquinas already states that "the person is the most perfect being that exists in all nature" (St Thomas Aquinas, *Summa theologiae*, I, 29, 3.) Thus "intellectual creatures are governed by God insofar as they are willed for themselves, while other creatures are ordered to creatures endowed with reason" (St Thomas Aquinas, *Summa contra gentiles*, III, 112.)

Justice — is the first prerequisite of social institutions, as truth is of the systems of thought'.[5] A complexity is that the "we" must include consideration of future generations in the sustainable earth environment. This is important for solidarity in the accelerating climate crisis. Thus, Sen (2002) argues for a model of impartial arbitration, which can avoid the problem of lack of solidarity with future generations.

In terms of practical implications, poverty and inequality are a clear indication of the failures of solidarity, at least in the sense of the broader concept stipulated by the Gospel, St. Thomas, Kant and the Magisterium of the Popes.

In short, poverty remains high and has been growing with the Covid19 pandemic, and inequality is increasing in general and in many countries. Compared to the time of *Rerum Novarum*, the distribution of labour versus capital has evolved rapidly with an increasing weight towards capital (Picketty 2015). Labour's share of income is decreasing, and capital's share is increasing, and consequently so is wealth inequality (ILO 2020).

A particular cause for concern in recent decades about this growing poverty and inequality is related to education policy, where poor individuals in rich countries and poor nations are caught in the trap of ignorance. Given the growing importance of education, now more important than ever in human history for developing solidarity, of equal concern is the wide and often widening quality gap between schools attended by the poor and schools attended by the non-poor. This occurs in such a way that differentiated or segregated educational pathways often emerge. Most alarming is the fact that, worldwide, especially with Covid-19, about 400 million children and young people who should be receiving a basic education are not in school at all.

But poverty and inequality are not the only problems to consider when looking into the symptoms and causes of solidarity failures. Particular mention should be made of the loss of the Christian memory and heritage of Europe and the West, accompanied by a sort of practical agnosticism and religious indifference, whereby many Europeans and Westerners give the impression of living without spiritual roots, a bit like heirs who have squandered a heritage entrusted to them by history and providence. As St John Paul II used to

5 J. Rawls, *A Theory of Justice*, The Belknap of Harvard University Press, Cambridge, MA (USA), 1971.

repeat: "European culture gives the impression of 'silent apostasy' on the part of people who have all that they need and who live as if God does not exist."[6]

How to address Solidarity deficits

Solidarity at scale requires collective action that facilitates the overcoming of the indicated deficits of macro-solidarity on the part of governments, strong powers, and the one-size-fits-all thinking that promotes mass atheism. Collective action is necessary and possible. Elinor Ostrom (2009) helped to refute the idea that, for example, natural resources would necessarily be overused and destroyed by selfishness in the long run. She refuted this idea by conducting field studies on how people in local communities manage shared natural resources, such as pastures and fishing waters in Indonesia and forests in Nepal. Professor Virgilio Viana does the same in the Amazon with his "Sustainable Amazon Foundation," creating or supporting small self-sustainable citizen communities. Other examples are the trade unions in Argentina, in particular the truck drivers' unions, and the Solidarity trade unions founded by L. Wałęsa in Poland, which have shown over the years a growing awareness of the importance of respecting human dignity and labour, as well as family and education for the common good in the autonomous communities they lead. These examples underline the multifaceted nature of the interactions with human beings, always keeping environmental issues in mind. Ostrom proposes some "design principles" for the stable management of local commons and human resources, including internal trust and reciprocity; appropriation and provision of common resources adapted to local conditions; cheap and easily accessible conflict resolution mechanisms; self-determination of communities; and communities recognised by higher-level authorities.

From the point of view of the necessary re-evangelisation, we can also follow the apostolic example of building small communities. When St Paul arrived in a city or in a certain region, he did not immediately build a cathedral. He built the small communities that are the leaven of our Christian culture today. These small communities grew and moved forward. Today, this pastoral method is followed in every missionary region, especially in Africa and Latin America. Religious communities should aim to transfer this social science

6 St John Paul II, Apostolic exhortation *Ecclesia in Europa*, 9.

knowledge from local levels to the management of global commons, such as the management of our common atmosphere. This requires global institutional arrangements and global solidarity.

Summarized conclusions

The concepts of marginality and relative deprivation of Pope St John Paul II and Pope Francis are important in identifying the causes of solidarity deficits because exclusion is a reality and because people more and more compare themselves with others in our urbanised, increasingly globally informed world. Promising actions that may help enhance solidarity in some key areas of humanity and the protection of the planet are:

Solidarity to overcome hunger and marginalisation…

…requires transformation towards healthier, more sustainable, equitable, and resilient food systems, including sustainable productivity increases and adding income and nutrition components to social protection programmes. Protecting the land rights of small farmers and smallholders, women, and indigenous peoples is paramount. Comprehensive coverage through social protection and basic social security, with cash transfers, employment and nutrition components, and access to capital and finance for the relatively poor, must be implemented. All forms of modern slavery must be avoided by upholding the dignity of labour and respecting the human body, which cannot be traded in part or as a whole, and which is only offered out of love.

Solidarity to overcome the climate crisis and achieve sustainable consumption…

…requires effective carbon pricing, taking into account equity implications. The poor must be protected from the rising costs of basic needs in the short term. Fundamental changes in consumption behaviour must start with promoting sufficiency and the concept of "enough." Instruments to trigger behavioural change include information, education, encouragement, targeted taxes, regulations and restrictions, and reducing food loss and waste.

Solidarity in pandemic management...

...requires human resources, equipment and, in particular, sharing vaccines and appropriate medicines with low- and middle-income countries. Sharing medical science as the global collective activity of medicine offers great opportunities. This requires that scientists stand in solidarity for good — not in laboratories that are themselves "structures of sin" — and that governments are open to facilitating, rather than hindering, such cooperation.

Solidarity in education...

...requires overcoming the dramatic inadequacy in some parts of the world of education, especially at the primary level. The "classical" basic skills expected in primary education — reading, writing and arithmetic — are no longer sufficient in a globalised world. They need to be complemented by competencies leading to objectives such as the enhancement, protection or preservation of work skills, cultural and linguistic heritage, ethical values, social cohesion, the environment, health, and openness to the transcendence of the human person[7] and of God.[8] In the future, this classic triad needs to be expanded into a new objective: "reading, writing, calculating, reasoning, synthesising, healing, praying, sharing."

Solidarity in teaching...

...requires a high level of expertise and knowledge on the part of teachers[9] so that students, who learn through the process of instruction, may achieve a standard of education that they would not obtain on their own, for instance, from social networks. The role of teachers as agents of education has to be more recognised and supported by every possible means: e.g., continuous coaching by those who have more direct access to knowledge (especially

7 "Persona significat id quod est perfectissimum in tota natura, scilicet subsistens in rationali natura" (St Thomas Aquinas, *S. Th.*, I, 29, 3.)

8 "Ipse Deus, qui est esse tantum, est quodammodo species omnium formarum subsistentium quae esse participant et non sunt suum esse" (St Thomas Aquinas, *De Potentia*, q. 6, a. 6, ad 5.)

9 "Doctrina autem importat perfectam actionem scientiae in docente vel magistro; unde oportet quod ille qui docet vel magister est, habeat scientiam quam in altero causat, *explicite et perfecte*, sicut in addiscente acquiritur per doctrinam" (St Thomas Aquinas, *De Veritate*, 11, 2 cor.) Also: "Magister docet inquantum actu scientiam habet" (*Ib.*, ad 6.)

trained academics and scientists), updating of professional training, adequate salaries and availability of information technology. To facilitate the success of the educational process, and to provide each member of society, and communities themselves, with that level of knowledge and learning that is a primary factor in empowerment and cooperation, it is important to aim for a high level of quality within the teaching profession, especially at the higher education level. This is also required so that, given that the expertise of every teacher is limited, what a student does not learn from one teacher he or she may learn from another, and so that teachers may learn from each other within a context of synergy.[10] To support and promote this dual process, which is at the origin of schools, universities and other educational institutions, suitable national, international and private resources must be made available to them so that, throughout the world, they can carry out their tasks in an effective way.

Solidarity and care when using digital technologies…

…requires wealth generated by AI and robotics to be used to build a society that is more compassionate and loving. We would have more time and energy to invest in care work, community services, and education. Standards to protect people's rights, such as the ones defined for human dignity in the UN Human Rights codex, must regulate AI and robotics. In all of these five action areas social science and natural science can play important roles, and solidarity makes a big difference, if facilitated at scale. Therefore, we must not tolerate the existence of a knowledge and values-based division, in addition to an unacceptable economic division that also includes a "digital divide'. Because, unlike the possession of material goods, knowledge and values, when communicated, shared and participated in, grow, develop and multiply.[11]

Solidarity with personal testimony and example…

…knowledge is indispensable in teachers who teach speculative truth, when their aim is to teach moral virtue. In the educator, moral virtue is even more necessary, hence the importance of example in this field, which is much more

10 "Debemus audire non solum ab uno, sed a multis [...] Quod non addiscis ab uno, addiscis ab alio" (St Thomas Aquinas *Sermon puer Iesus*, https://isidore.co/aquinas/Sermo8PuerIesus.htm).

11 "Spiritualia bona sunt specialiter non ritenenda per se, quia comunicata non minuuntur sed crescunt" (St Thomas Aquinas, *De Malo*, q. 13, 1 pret. 8.)

effective than theoretical indoctrination: "because in questions of human actions and passions we give less credence to words than to actions."[12] When we place moral virtue above actions, we discover more easily the truth about the good that must be practiced. Paul VI said that today's men and women needs role models and life models more than teachers.[13] Moreover, when teachers contradict themselves with their behaviour, all discourse is futile, especially for the young people who begin to admire them and then feel cheated. Therefore, the teacher's behaviour should endorse his or her words and account for them. Kierkegaard famously speaks ironically of those teachers who resemble a swimming instructor who only knows how to swim in theory, and thus always teaches on dry land, afraid that a student will take him seriously and jump into the water: for such a teacher would not be in a position to help.

Solidarity in the dynamics of the participation in the grace of Christ...

...requires that each person in friendship with God be aware that they participate in a fullness of grace capable of sanctifying them, and also of actively sharing this grace with someone else for their salvation in accordance with charity. It requires those who live their faith in operative charity to act out such ebbs and flows of sanctifying grace, for example, from mother to child, from teacher to student, from spiritual father to sons and daughters, and vice versa, and also between friends and spouses on the basis of the grace of the sacrament, as well as in all human relationships that become fraternal "bonds of perfection" (Col. 3:14) nourished by the Eucharist. This teaching of St. Thomas Aquinas[14] finds confirmation in one of the most innovative and decisive statements of the Magisterium of the theologian Pope Benedict XVI to achieve that "fraternity of solidarity" advocated by Francis: "As the objects of God's love, men and women become subjects of charity, they are called to

12 "Circa actiones et passiones humanas minus creditur sermonibus, quam operibus. Si enim aliquis operetur quod dicit esse malum, plus provocat exemplo quam deterreat verbo [...] Quando ergo sermones alicuius dissonant ab operibus sensibiliter in ipso apparentibus, tales sermones contemnuntur. Et per consequens interimitur verum quod per eos dicitur" (*In X Ethic.*, lect. 1, n. 8-9.) Online at http://www.josephkenny.joyeurs.com/CDtexts/Ethics10.htm

13 „Modern man listens more willingly to witnesses than to teachers, and if he does listen to teachers, it is because they are witnesses" (St Paul VI, *Address to the Members of the Consilium de Laicis* (2 October 1974): AAS 66 [1974], p. 568; also, St Paul VI, Apostolic exhortation *Evangelii Nuntiandi*, 41.

14 Cfr. M. Sánchez Sorondo, *La gracia como participación de la naturaleza divina*, Città del Vaticano, 2021.

make themselves instruments of grace, so as to pour forth God's charity and to weave networks of charity. This dynamic of charity received and given is what gives rise to the Church's social teaching, which is *caritas in veritate in re sociali*: the proclamation of the truth of Christ's love in society."[15]

Most importantly, we call on the world's leaders to accept their sacred responsibility to live up to the law of nations recognised in the Universal Declaration of Human Rights, and to acknowledge that 75 years is long enough to fulfil what the world promised in the shadow of the Holocaust and the Second World War. Our most sacred task is to prevent another episode of self-destruction, whether by war or environmental devastation. For our survival and well-being, for the sake of our children and the generations to come, we must create a world of solidarity and justice, in which the dignity and rights of all are assured, in the awareness that every human being is not a self-made product but a child of God, created in his image and likeness and destined for eternal life.[16] These are the indispensable conditions to achieve the project of solidarity between humans and the planet proposed by Pope Francis in *Laudato Si'* and in *Fratelli Tutti*.

15 Benedict XVI, Encyclical letter *Caritas in Veritate*, 5.

16 "Homo autem non solum est civis terrenae civitatis, sed est particeps civitatis caelestis Ierusalem, cuius rector est dominus, et cives Angeli et sancti omnes, sive regnent in gloria et quiescant in patria, sive adhuc peregrinentur in terris, secundum illud apostoli, *Ephes*. II, 19: *estis cives sanctorum, et domestici Dei*, et cetera. Ad hoc autem quod homo huius civitatis sit particeps, non sufficit sua natura, sed ad hoc elevatur per gratiam Dei. Nam manifestum est quod virtutes illae quae sunt hominis in quantum est huius civitatis particeps, non possunt ab eo acquiri per sua naturalia; unde non causantur ab actibus nostris, sed ex divino munere nobis infunduntur" (St Thomas Aquinas, *De virtutibus in communi*, q. un., a. 5.)

Abstract

The role of solidarity in the quest for the sustainable improvement of the material and spiritual living conditions of people and planet earth

This article focuses on contemporary challenges to solidarity. The author starts by outlining the paradoxes of solidarity, concerning the existence in the world of both an excess and a deficit of solidarity in the material and spiritual spheres of human life. The aim of the article is to try to identify ways to overcome these paradoxes. The Church's social doctrine is intended to help in this task.

Keywords: solidarity, climate crisis, consumption, education, modern technologies, hunger problem, pandemic

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Sánchez Sorondo M., *La gracia como participación de la naturaleza divina*, Città del Vaticano, 2021.

Bp. Marcelo Sánchez Sorondo — an Argentine Catholic bishop, the current Chancellor of the Pontifical Academy of Sciences and the Pontifical Academy of Social Sciences. Having issued a long set of various publications in the sciences, he earned several honours such as the Légion d'Honneur of France in 2000. In 1976 he graduated summa cum laude in Philosophy at Perugia University. From 1976 to 1998 he was a lecturer in the history of philosophy at the Lateran University in Rome, where from 1982 onwards he was a full professor in the same discipline. He was dean of the Faculty of Philosophy at the same university for three consecutive terms from 1987 to 1996. From 1998 to 2014 he was a full professor of the history of philosophy at the Libera Università Maria SS. Assunta (Rome) and in the same year was appointed president of the degree course in science of education. On 5 October 1998 he was appointed Chancellor of the Pontifical Academy of Sciences and of the Pontifical Academy of Social Sciences. In March 1999, he was also appointed Secretary Prelate of the Pontifical Academy of St. Thomas Aquinas. On 19 March 2001, Pope John Paul II consecrated him as Titular Bishop of Forum Novum (Vescovio). On 19 July 2011, Pope Benedict XVI made him a member of the Pontifical Commission for Latin America.

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New forms of solidarity in the light of John Paul II teachings

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The principle of solidarity is an ancient one. It is one of the four pillars of Catholic Social Teaching (CST). So in which sense can we speak today of "New Forms"? It is a fact that we are facing in this time a silent counterrevolution, that of social desolidarity, which manifests itself in the growing expansion of the many areas of exclusion that tend to drive the "existential outskirts," as Pope Francis calls them. What do we find at the roots of such a tendency? A specific cause has to do with the endemic and systemic increase of structural inequalities, which are advancing faster than the increase of income and wealth. Yet, inequality is not a fate, nor a historical constant. It is not a fate, because it has to do with the institutional structure, that is, with the rules of the economic game that society decides to give itself. We only have to think of institutions like the labour market, the banking system, the welfare system, the tax system, and the educational sector. Depending on how they are designed, different consequences affect how income and wealth are distributed among those who have contributed to produce them. Nor are rising inequalities a historical constant, because there have been times when, in some countries, they diminished.

The question then arises: if inequalities do not increase because resources are scarce, or because we do not know how to act, or because they are due to particular hardships affecting certain categories of persons or certain territories, what are they the ultimate result of? My answer is that this is due to the widespread belief in two dogmas of social injustice. The first is that

society as a whole would benefit if individuals acted for their own personal gain as the homo oeconomicus metaphor dictates. That is doubly false, as the literature has shown for a long time. I will just point out that the poor are not so by nature, but because of the way economic institutions are designed. Condorcet had already realized this in 1794 when he wrote in *his Esquissei*:[1] "It is easy to show that fortunes tend *naturally* to equality and that excessive disparity either cannot exist or must quickly cease unless civil laws impose *artificial means* to perpetrate them" ('Civil laws' are nothing but what today we call the rules of the game.)

The other dogma of injustice is the belief that elitism has to be encouraged because it produces efficiency, in the sense that the welfare of the majority increases all the more if the abilities of the few are promoted. Therefore, resources, incentives, and attention should be reserved for the most gifted, because it is their commitment that advances the progress of society. The exclusion of the less talented from economic activity, for example in the form of job insecurity and unemployment, is something to be accepted to foster growth. Also, this dogma lacks any scientific foundation; it has been disconfirmed both theoretically and empirically. Yet, there are many 'rational fools' (in the sense Amartya Sen)[2] who continue to believe it.

The teaching of Pope John Paul II insisted constantly on this aspect. In his speech to the United Nations on 5 October 1995 the pontiff stressed that it is possible to reach an agreement on social and political issues on a shared common basis since "the universal moral law written on the human heart is precisely that kind of "grammar" which is needed if the world is to engage this discussion of its future."[3] In February 2004, in his address to the members of the Congregation for the Doctrine of the Faith, John Paul II — after recalling that the natural moral law can be a dialogical tool for everyone, said that the main obstacle to this was the diffusion among faithful of an ethics based on fideism, hence the lack of an objective benchmark for laws, which are often

1 Nicolas de Condorcet, *Esquisse d'un tableau historique des progrès de l'esprit humain*, 1794.

2 Amartya Sen, *Rational Fools: A Critique of the Behavioural Foundations of Economic Theory*, „Philosophy & Public Affairs." 6 (4), s. 317-344.

3 John Paul II, *Apostolic Journey of His Holiness John Paul II to the United States of America. The Fiftieth General Assembly of the United Nations Organization. Address of His Holiness John Paul II*, United Nations Headquarters (New York) Thursday, 5 October 1995, p. 3. https://www.vatican.va/content/john-paul-ii/en/speeches/1995/october/documents/hf_jp-ii_spe_05101995_address-to-uno.html

based on social consensus alone.[4] This line of thought — embraced, also by Benedict XVI — has in *Caritas in Veritate*[5] its first complete theorization. For that matter, before becoming Pope, Cardinal Ratzinger, in his work *God and the World*, wrote: "Natural law reveals to us that even nature contains a moral message. The spiritual content of creation is not only mechanical or mathematical [...] There is a surplus of spirit, of 'natural laws' in the universe, which is imprinted with and which reveals to us an inner order."[6]

In his many writings, Pope John Paul II seeks to awaken consciences to the scandal of a humanity which, despite ever greater potential at its disposal, has yet to succeed in overcoming some of the social plagues that humiliate the dignity of the person. In line with the Magisterium of his predecessors, the Holy Father declares his emphatic opposition both to "ideologies" that defend the absolute autonomy of markets and financial speculation, and to an attitude of indifference that characterizes today's political, economic, and social situation.[7]

To such elements of irresponsibility and social disintegration, one must respond with a determined search for an economy based on respect for the dignity of the human person — an inclusive economy, supported by justice, temperance and the culture of gift as gratuitousness, capable of marking a substantial change in the conditions, styles and models of life of all humanity, preserving and improving the environment for current and future generations. The first observation of the Social Doctrine of the Church, as well as of social ethics founded on integral human development, is that every political and social action should have a clear anthropological perspective; in fact, economic and social systems do not automatically serve human dignity; rather, they should always be guided by our responsible action inspired by human dignity and, accordingly, carried out with the right intention, oriented by wise national and international policies, and supported by appropriate levels of spiritual, social and material capital.

4 See. John Paul II, *Address of John Paul II to the Participants in the Biannual Plenary Assembley of the Congregation for the Doctrine of the Faith*, Friday, 6 February 2004, p. 5. https://www.vatican.va/content/john-paul-ii/en/speeches/2004/february/documents/hf_jp-ii_spe_20040206_congr-faith.html

5 Benedict XVI, Encyclical letter *Caritas in Veritate*.

6 J. Ratzinger, *God and the World*, San Francisco, 2002, p. 142.

7 See: John Paul II, Encyclical letter *Centesimus Annus*, 1991.

That is why Pope John Paul II declares his opposition to ideologies which defend the absolute autonomy of the marketplace and financial speculation. On this point we read in *Sollicituto Rei Socialis* (1987): "Responsibility for this deterioration is due to various causes. Notable among them are undoubtedly grave instances of omissions on the part of the developing nations themselves, and especially on the part of those holding economic and political power. Nor can we pretend not to see responsibility of the developed nations, which have not always, at least in due measure, felt the duty to help countries separated from the affluent world to which they themselves belong. Moreover, one must denounce the existence of economic, financial and social mechanisms which, although they are manipulated by people, often function almost automatically, thus accentuating the situation of wealth for some and poverty for the rest. These mechanisms, which are maneuvered directly or indirectly by the more developed countries, by their very functioning favor the interests of the people manipulating them at in the end they suffocate or condition the economies of the less developed countries."[8]

It is an acknowledged fact that, in our time, the market and the culture of contract on which the market is based have grown progressively more important in our lives. There are those who believe that now the global market will recreate social obligation and rebuild human relationships, and they want everything in our social, political, and cultural life to be directed towards the efficiency of mechanisms and the effectiveness of procedures. The "good news" of competition and globalization seems to have become, in recent years, the true ideology of the post-Fordist society, a sort of "single thought." CST (Catholic Social Teaching), instead, believes that a new human dimension to all this integration of the economies through the market is needed and that a model of development is a good one *not only* for the efficiency of the results it achieves, but also for its ability to take into account the *whole* human being — in all his dimensions — and *all* the human beings, bearing in mind the right of each individual to realize his potential and aspirations. While the *Magisterium* underlines this aspect it does not at all, as some would wish, reject the market, the social role of private enterprises, and finance.

Rather, SRS (*Sollecitudo Rei Socialis*) and CA (*Caritas in Veritate*) hold that everyone can help make the rules and build the institutions, to select the aims and decide the priorities by which the economy is governed. And if in

8 John Paul II, Encyclical letter *Sollicituto Rei Socialis*, 16.

the teachings of the Church there is critical reference to the dominant model of development, this is not because its enormous potential and the benefits it has brought to humankind are not acknowledged, but because such potential is too often exploited to create inequalities rather than to enhance solidarity; to increase what is superfluous rather than to redistribute necessities; to impose the dominance of one particular model of development rather than to acknowledge the resources of the different models.

Humanistic management in a post-modern society

The landscape of contemporary corporations is changing. Since the financialization of the economy in the early 1980s, corporate governance practices have tightly linked the purpose of business with maximizing shareholder value. However, as the 21st century pushes on, there has been an increased emphasis on other stakeholder values, particularly social and environmental concerns. This trend in corporate governance has fuelled the emergence of new organisational forms. So far, attention has been devoted mainly to the business model. The time has come to reconsider the role of the management model as well.

Empirical evidence shows that the major crises of our time are a result of the way we conduct business. The traditional corporate form has, in many ways, monopolized our understanding of how we think and talk about business. The rise of new forms of organization will require re-imagining what the fundamental building blocks of business are. As C. Mayer has recently written: "The corporation has evolved substantially over the past hundred years, but the very evolutionary processes that might have been expected to make it better suited to the world in which we live, have done exactly the opposite."[9] One cause of this is certainly our own misconception about the nature and role of the company. It is dangerously reductionist to characterize it as a mere "nexus of contracts" between different parties, such as employees, suppliers, investors, clients and the community. According to the received view, the company exists for the benefit of its owners — the shareholders — and those charged with running it — the directors — have a duty to further their

9 C. Mayer, *Firm Commitment*, Oxford, 2013, p. 2.

interests. Today we know that this approach has serious defects, as was remarked, among others, by pope John Paul II in his encyclical *Centesimus Annus* (1991).

The Report[10] by United Nations on the results achieved during the first fifteen years since the launch of the UN Global Compact, gives evidence that corporate practices are changing, albeit in slow motion, as a consequence of high-profile clashes between companies and civil society. It has becoming increasingly clear that the single-minded goal of profit maximization at any cost is fracturing societies and destroying the environment. Essentially, business has been threatening the very elements that underpin its own existence. Today, the umbrella of corporate sustainability (both social and environmental) covers a much broader range of issues than before. However, there is still a very long way to go before sustainability is fully embedded into the DNA of business globally, but there are clear signs of progress. In this regard, a strategically important role has been and will be played by civil society organizations, that contribute to a cognitive overhaul around the purpose of business and its obligations to society, inspiring a new narrative around business as a force for good. The notion of "structures of sin," coined for the first time by John Paul II in *Sollicitudo Rei Socialis* is of great relevance in this respect.

The question arises: which factors should be held responsible for the serious reductionism mentioned above? There is no doubt that a major factor has to do with the benign neglect towards the ethical dimension in the discourse concerning business life. Indeed, while principles of morality are well developed in relation to individuals, they are not in respect of companies. Yet, the corporation is a moral agent in so far as it is a juridical person. In fact, the competitive advantage of nations depends on the moral fiber of their corporations. The risk of moral decay through market interactions has been discussed extensively in politics, ethics, and sociology, but not in economics. Yet, empirical evidence shows that market interaction causally affects the willingness to accept negative consequences for a third party—what in the economic literature are called pecuniary externalities, not to be confused with technical externalities. Ethics in business schools tends towards economic instrumentality and a utilitarian outlook. This attitude is prone to the so-called "cut

10 The Report by United Nations, *Impact. Transforming Business, Changing the World*, New York 2015.

flowers syndrome": the language of values may look attractive for a while, but severed from their cultural and spiritual roots, they wither.

A relevant piece of evidence about the "cut flowers syndrome" comes from the recent experiment carried on by A. Cohn, E. Fehr, M. Marechal[11] concerning the financial sector's business culture — a sector that in recent years has been involved in numerous scandals that have undermined confidence in the financial industry. The results suggest that the prevailing business culture in the sector favors dishonest behavior, implying that measures to re-establish an honest culture are of decisive importance. For example, several experts and regulators have proposed that bank employees should take a professional oath, analogous to the Hippocratic oath for physicians. Such an oath, supported by ethics training, could prompt employees to consider the impact of their behavior on society rather than focusing on their own short-term benefits. A norm change also requires that companies remove financial incentives that reward employees for dishonest behaviors. These measures are an important step towards fostering desirable and sustainable changes in business culture.

In the search for the origins of unethical behavior by entrepreneurs, attention has been given to the potential influence of a cognitive process known as moral disengagement that serves to deactivate the self-regulatory process that normally deters individuals from actions that violate their own moral standards. Three basic mechanisms tend to generate moral disengagement.[12] Firstly, individuals can cognitively distort reprehensible acts so that they appear benign (e.g., true, we did pump our waste into the lake, but the pollution we generate is trivial). Secondly, people minimize their personal role in the unethical decisions through diffusion of responsibilities (e.g., I evade taxes, since the tax pressure is too high). Finally, people can hold victims as responsible for the harm they experience (e.g., they did not pay attention, so it is their fault if they are suffering). Indeed, a full understanding of morality must explain not only how people come to behave morally but also how they can behave inhumanely and still retain their self-respect and feel good about themselves.

Which consequences stem from the phenomenon briefly outlined in the previous paragraph? A major consequence is the scandalous increase of global

11 See. A. Cohn, E. Fehr, M. Marechal, *Business culture and dishonesty in the banking industry*, Nature, Dec. 2014.

12 See: A. Bandura, *Moral Disengagement*, New York 2016.

inequality[13] that is today one of our most urgent social problems. Curbed in the decades after World War II, it has returned in the past thirty years with a vengeance. We all know the scale of the problem, but there has been little discussion of what we can do but despair. Yet, a comprehensive set of policies that could bring about a genuine shift in the distribution of income and wealth is possible. We need fresh ideas, and in this context, the role of entrepreneurs is fundamental. In particular, we have to go beyond placing new taxes on the wealthy to fund existing programmes. We need new policies in areas such as technology, employment, social security, the sharing of capital, and also taxation. Above all, we need to go against the widespread arguments and excuses for inaction: that intervention will shrink the economy, that globalization makes action impossible, and that new policies cannot be afforded. All this is simply untrue.

The truth is that the inequalities we observe are the result more of power relationships, generated by the unfettered market's tendency toward monopoly, than of marginal product. Today, sectors such as telecoms, cable TV, digital branches, health insurance, finance, pharmaceuticals, agro-business, and a few others cannot be understood through the lens of competition. These sectors are simply oligopolies maintaining huge market power. It should be noted that the increase in inequality affects not only individuals and families but also firms. For example, the 90th percentile firm in the USA sees returns on investment in capital that are more than five times the median. A quarter of a century ago, this ratio was two. The implications are profound. The social and political legitimacy of the market economy is based on the assumption of the competitive model. But if markets are monopolistic, hence based on exploitation, the rationale for laissez-faire disappears. Our economies have fallen short of any conception of a good economy — an economy offering a life of richness for all. The preoccupations are targeted at prospering, not flourishing.

Authentic inclusion cannot be regarded merely as the product of material outcomes, for example, a function of ensuring adequate levels of equality of income in a society. Solidarity is not just a matter of the redistribution of wealth. Rather, inclusion is a matter of participation in the common good, a participation through which persons and their communities become truly "dignified protagonists of their own destiny," as Pope Francis has put it.

13 See: B. Milanovic, *Global Inequality*, New York, 2016.

Inclusion in this full sense requires us to take human freedom into account. We cannot simply provide more things to people but rather must foster the conditions in which their own agency can be engaged and employed in constructing together the common good of all.

It is for this reason that *subsidiarity* is a necessary condition for the generation of authentic solidarity and inclusion. Subsidiarity is not merely a tool for maximizing efficiency in the delivery of social services. Instead, it is grounded in the requirements of human dignity and the need for persons to participate freely in realizing their own good and the good of others with whom they are in community.

The essential centrality of subsidiarity to fostering inclusive solidarity can be confirmed concretely by a variety of recent empirical studies as well. For example, it helps explain why some distance adoption programmes work better than others, why mentorship is much more effective than business skills training in generating successful entrepreneurship among the poor, and why government human rights interventions to reduce domestic violence in city slums have less impact than local initiatives to foster women's education and employment, and adequate child care.

While subsidiarity is essential to building inclusive solidarity in this way, it is also true that solidarity is needed to prevent the principle of subsidiarity from becoming merely a form of devolution and decentralization. Only in relation to the common good can one judge when and how a community like the state should intervene with a *subsidium* for a primary, more local community. Subsidiarity without solidarity can become an abandonment of the poor and marginalized to their own conditions rather than fostering their freedom, agency, and participation.

The notion of common good at the heart of solidarity

In current ethical and political discourse, the concept of the common good (CG) occupies a central place, although it is defined in many diverse ways. It had a prominent place in the political philosophy of Aristotle and Aquinas; it lost ground when Western philosophy took an individualistic turn and when the idea of the non-existence of a unitary conception of the good became dominant. However, it continued to be one of the main pillars of Catholic Social

Teaching, according to which: "The common good does not consist in the simple sum of the particular goods of each subject of a social entity. Belonging to everyone and to each person, it is and remains 'common' because it is indivisible and because only together it is possible to attain it, increase it and safeguard its effectiveness."[14] Three are the key components of CG that appear in this definition: not being a sum total; indivisibility; jointness in accessing.

In recent times, the notion of CG has returned to relevance in view of the modern manifestations of totalitarianism and new forms of war, as a response to questions such as: is it possible to have a politics founded on a universal morality? Can there be a univocal notion of good in a multicultural world? Is a welfare state that combines economic progress with social justice viable? etc. Having long been absent from discourses in the public sphere and supplanted by notions such as "the general interest," "the total good," and "the public good," CG is making today its comeback. It refers to the vocation of any human community to "good life," i.e. to a life where all members of the community, as well as the community itself, can achieve their full potential. However, the concept of CG is far from being universally accepted. When it is identified with a set of democratic freedoms or human rights, or with the generic object of redistributive policies, it is widely accepted. But when it is presented as a good that not only is shared by citizens but also exists in its own right, the level of acceptance declines considerably.

An intriguing issue deserving further and serious research is the one dealing with the phenomenon of economic complicity. It is known that our decisions can have far-reaching effects by either unabling or debasing human lives. In his important contribution, *Market Complicity and Christian Ethics*, Albino Barrera raises a fundamental question: "Are we morally responsible for the distant harms spawned by our market transaction? If so, what are the grounds for these non-contractual obligations?"[15] The author identifies how the market's division of labor and specialization makes us unwitting collaborators in others' wrongdoing and in collective ills. There is little scholarship on economic complicity and even less on moral complicity. To what extent — asks

14 *Compendium of the Social Doctrine of the Church to His Holiness Pope John Paul II Master of Social Doctrine and Evangelical Witness to Justice and Peace*, p. 164. https://www.vatican.va/roman_curia/pontifical_councils/justpeace/documents/rc_pc_justpeace_doc_20060526_compendio-dott-soc_en.html#Rights%20of%20peoples%20and%20nations

15 See: A. Barrera, *Market Complicity and Christian Ethics*, Cambridge 2011.

Barrera — are we culpable for the unintended consequences of our actions? Common sense tells us that we cannot be held to account for everything. But where do we draw the limits of our moral obligations? To compound the dilemma, there is the fact that we often have to deal with cumulative harms in which acts that seem benign at the individual level become very injurious at an aggregate level.

An important case for market complicity is the strengthening of the wrongdoer's economic viability in the field of human trafficking. This occurs by increasing the demand for the wrongful activity. The incremental demand furnished by customers willing to buy the services provided by trafficked victims directly assists the many criminal organizations by pushing them beyond their shutdown point. This occurs whenever increased consumer demand helps these organizations achieve economies of scale in production. So, individual buying decisions can potentially be the tipping point in bringing the organization over the top to its optimum scale of production. The power of consumer agency is confirmed by hard empirical evidence.

Concerning the freedom to migrate, a major element of profound differentiation between today's migrations and those of the past is that the thesis in vogue since the 80s of the last century does not seem to be supported by the facts. According to the thesis, the most effective instrument for reducing the migratory pressure would be to increase the employment potentialities in the developing countries. That is, the only credible way to stop the *increase* in the migratory flows would be to intervene on the process of economic growth of the countries that generate the flows. How solid is this conviction? It is often stated that economic development, by increasing per capita income, reduces the incentive to emigrate. This belief is fallacious for two reasons: on the one hand, as the well-known "Kuznets curve" teaches, in the first phases of the development process, the increase in income is always accompanied by an increase in the inequalities between social groups. That is, the increase in income *never* takes place in an equi-proportional way among all the segments of the society. And as we all know, an increase in inequalities is a powerful factor that encourages emigration. On the other hand, empirical evidence confirms that in the initial phases of the development process, an increase is always recorded in the propensity to emigrate as a result both of the structural change (development expels workers from agriculture in order to channel them towards the industrial sector, but this takes time, and

so a part of the ones expelled takes off for abroad), and the change in expectations in life (once the old equilibrium of stagnation is broken, not everyone feels like waiting for the definitive take-off, and so they take off for abroad).

Some policy implications for present-day situation

I would like to underline some of the many relevant implications still valid for the present-day situation stemming from the warm and paternal invitation of John Paul II to move ahead towards a different kind of economy, one that is inclusive and not exclusive, humane and not dehumanizing, one that cares for the environment, not despoiling it.

First

The still prevalent mood in economics is based on a wrong concept of value, according to which value is identified with market price only. Such a reductionist notion of value has major consequences for the way the economic system is structured. For example, relational goods, care goods, commons, gratuitous goods, etc., do not enter the metric of GDP. Yet, they are essential for our flourishing. An extractivist and technocratic mentality prevents distinguishing public values — those that are collectively created by a plurality of actors — from public goods that depend on pricing efficiency for their identification.

Second

Companies need to embrace a sense of purpose beyond making only profits; they have to consider the well-being of all the stakeholders. Investors need to focus on the long term and to consider explicitly the social and environmental impact of their investments. Civil society organizations need to work together to address global challenges through community organizing practices. We need to understand our corporate civilization in light of the failures of mainstream thought to provide us with analytical concepts adequate to our corporate world, in which productive property is owned by abstract legal entities rather than persons. Today, enlightened business leaders are understanding

that focusing on maximizing shareholder value has no future. The tendency is to move towards the "total societal impact," according to which companies, as cognitive institutions, are considering the impact of their activities on the social and environmental dimensions as well as on the economic one.

Third

It is urgent to rewire finance, which requires that the financial accounting systems include social and environmental metrics and that impact investing becomes a norm of behavior. Indeed, the pursuit of profit is not a problem, per se. The real problem is in the incompleteness of the profit calculation, namely what is left out. And the omissions are today unbearable. Liberalized finance plays a key role in contemporary rentier capitalism, which in turn contributes to creating rising inequalities. The Covid-19 outbreak has not only revealed our false securities, it has also exacerbated the deep fault lines in the global economy. We record the value of what we harvest from nature, but make no matching entry for its degradation.

Fourth

Governments need to reaffirm their fundamental role in fixing the rules of the economic game in view of the common good and not of the interests of particular groups of actors. Without rules, globalization becomes a jungle. The global market poses problems but can become the solution if we change the rules of the game. It is not acceptable, nor sustainable, for an economy in which the market and political powers allow privileged individuals and businesses to extract a great deal of rent from everybody else. Weak competition, feeble productivity growth, high and growing inequalities, and degraded democracies are failing citizens. Democracies have to cooperate among themselves to write down rules, especially in the area of the international trade regime.

Fifth

Wanting to do the right thing is something different from knowing the right thing to do, and that in turn is something other than actually doing the right thing. It is a specific responsibility of scholars and academic institutions not

only to see the world as it is, but also to imagine the world as it might be. Mainstream economics suffers today from serious sins of omission: it ignores many important topics and problems when they are difficult to approach according to the standard way of doing research. We need pluralism in our universities and research centers, since different terrains call for different vehicles. (A sailboat is useless in crossing a desert!) Hence, we need to re-examine the institutions that host publications and promote young economists.

Sixth

Integral human development is meant to be transformational in that it aims to improve people lives by enhancing their capabilities. The integral human development approach in the sense of *Laudato Si'* (2015) differs from conventional approaches to development that suffer from paternalistic practices substituting one's own values to those of the people one is trying to help. Such practices might favor the growth of income and riches, but do not promote authentic human development.

In view of the considerations above, the following questions are worthy of great attention:

a) Since performance indicators of an economy have an impact on the modes of performing, which proposals should be advanced to change the way the goodness of an economy is measured? In particular, what can be said about the *Better Life Index* released by OECD for the first time in May 2011? Or the Pew Research Center's *Life Satisfaction Index;* or the *Social Progress Index*; or the UNDP *Human Development Index*? Which improvements can be proposed?

b) Given that it is impossible for marginalized people to engage in public reasoning processes without being nurtured by certain webs of relations which first recognize them as persons, what can be done, at the grassroots level, to revert processes of urban segregation and exclusion? It is a fact that the usual approach of international agencies is to build adequate governance structures. While this remains indispensable, it should not be the only focus. While rushing to create multi-party parliamentary systems, independent judiciaries, free press, etc., one should not forget the bottom-up way. Even with the best of governance and visionary leadership, if there is no inclusive development allowing

people to cooperate among themselves, those institutions will never function properly.

c) The social economy has been reinvigorated in recent decades. Yet it has enormous, untapped potential to be put to work. Which strategies are needed to provide the institutional and practical support that social economy organizations require if they are to be able to face the inclusion challenge? The experience of social businesses demonstrates that people can be active in creating their own work and enterprises. An economic system is like a natural environment. It requires diversity to strengthen its resilience. It follows that the many different organizational forms (cooperatives; B-corporations; for-profit corporations; social businesses; ethical banks; social agriculture, etc.) should be sustained. They contribute to the generation of social capital, as well as economic value. Which proposals can be advanced to avoid that inadequate regulation might harm this biodiversity by favoring the "one-size-fits-all" thesis?

d) It is well accepted that one of the most effective routes towards inclusive solidarity is the promotion of decent work for all workers in all sectors of the economy, including the informal economy. In 1999, the ILO proposed to include the Decent Work Agenda within the post-2015 Development Agenda. Not much has been done so far. So, what should be done in this regard? In 2016, the ILO started a round of discussions about Decent Work in Global Supply Chains (GSCs). What should be the role of multinationals in this regard? Are the "Ruggie Principles" strong enough to guarantee the promotion of decent work in GSCs? How can international labor standards be adjusted to take into consideration the specificities of the various geographical areas, avoiding the risk of using the concept of decent work as a tool to encourage excessive protectionist policies? What strong actions should policy-makers take in order to promote access to decent jobs for all segments of society and to promote access to education for skills?

e) Evidence suggests that specific and new welfare policies offer an important contribution to this end, in particular with regard to NEET youngsters. How should we conceptualize an updating of the traditional welfare state in the direction of a new relational welfare system where expressions such as social governance by networking, co-production,

circular subsidiarity, social innovation and the like can find their proper expressive way?

f) In recent times, financial global development has been accompanied by amplified economic volatility. Due to the heavy public cost of the bail-out processes, the financial sector is undergoing profound change, both through added regulation and through internally promoted reform. The call to give this reform a human and ethical perspective also involves the idea of *inclusive finance*, i.e. finance that helps fight exclusion. Which actions should be implemented to this end?

By way of conclusion

This essay advocates a point of view on the relationship between CST's criteria and an effective path to inclusive prosperity that is alternative to the two views that are prevalent today. One holds that the Catholic conscience cannot but be radically anticapitalist, seeing in capitalism an adversary to vanquish no less dangerous than communism. This school appeals — too often naively and sometimes instrumentally — to the line of thought running from *Rerum Novarum* (1891) through *Quadragesimo Anno* (1931) *and Gaudium et Spes* (1968) to the *New Catholic Catechism* of 1992, which affirms: "The Church rejected the totalitarian and atheistic ideologies associated, in modern times, with 'communism' and 'socialism'. However, it also rejected, in the political practice of 'capitalism', individualism and the primacy of the law of the market over human labor." The other view — which is today in minority — contends that at least since John Paul II's encyclical *Centesimus Annus* (1991) there has been the long-awaited turnabout. That is the thesis of M. Novak and other intellectuals known in America as "neo-conservatives," who argue that the origins of the failure of what they call "democratic capitalism" to connect with the Catholic ethic lie in the mistaken identification of the "bourgeois spirit" with a lack of faith.

To me, both these interpretations, legitimate and interesting as they may be, are reductive: one takes justice, the other liberty, as the sole governing principle for gauging assonance or dissonance between Catholicism and capitalism. Catholic thought has always refused this kind of dichotomy. Rather, its intent is to hold together the three basic principles of any social

order — exchange of equivalents, redistribution, and reciprocity — acting not only on the cultural but also on the strictly institutional plane. Truth to tell, this project has not always — or should we say, almost never — been fully realized. Historically, deviations from the mainstream — corporativist, capitalist, communist — have been the rule rather than the exception. Interestingly, where in 1891 Leo XIII identified the main problem as "the abuses of capitalism and the illusions of socialism," a hundred years later, John Paul II decried "the abuses of socialism and the illusions of capitalism." But none of this warrants the conclusion that the Catholic ethic can be dragged to one side or the other and reduced to a partisan vision.

The guiding idea of CST is interdependence among four well-known principles. As the Compendium of the Social Doctrine reminds us: "The principles of the Church's social doctrine must be appreciated in their unity, interrelatedness and articulation."[16] Of course, the forms that it may take change with time and place, but the Catholic ethic can never be called on for cultural support for modes of production or economic organization that, in practice, apart from verbal statements, deny the perspective of the common good that constitutes a sort of overarching framework.

That a kind of revival of the concept of the common good is under way today is confirmed by numerous signs, which speak, in essence, of a renewed interest in seriously considering the civil economic viewpoint, at least as a working hypothesis. There is nothing to marvel at here. When one acknowledges the looming crisis of our civilization, one is practically obliged to abandon any dystopic attitudes and dare to seek out new paths of thought. Ultimately, this is the main legacy of John Paul II's testimony that constitutes an authentic *ispiera* — the ray of light that, penetrating through a crack in a shadowed environment, illuminates it, making visible what is stationed within.

There are two wrong ways — warns Pope John Paul II of facing up present-day major challenges. One is to yield to the temptation to remain above reality through utopia; the other is to remain below reality through resignation. But if society is to be a match for today's challenges, it must avoid such pitfalls. It must not waver between the blithe optimism of those who see the historical process as a triumphant onward march of humanity towards its

16 *Compendium of the Social Doctrine...*, p. 162.

full realization, and the despairing cynicism of those who believe, in Kafka's words, that "there is a destination, but no way there."[17]

Hence the need for a new message of hope. The certainties that technical and scientific progress offer us do not suffice. It has certainly increased, and will continue to increase, our ability to find the means of attaining all manner of goals. But although the problem of means now seems far less serious than it used to be, we cannot assume that the same will be true of the problem of ends — a problem that can be stated as 'What should I want?', rather than 'What should I do to obtain what I want?' Today the human being is afflicted by the need to choose his/her ends and not just his/her means. Hence the need for new hope: faced with an ever-stronger chain of means, people today seem unable to find any alternative to submitting or rebelling. Things were different when the chain of means was weaker. It is understandable that the have-nots will focus their hope on having: this is the "old hope." But it would be wrong to continue believing this today. Although it is true that it would be foolish to abandon the pursuit of means, it is even more true that the "new hope" must be focused on ends. What hoping means today is precisely this: not considering ourselves either as the mere result of processes that are beyond our control, or as a self-sufficient reality that does not need fraternal relationships with others.

17 Franz Kafka, *The Zürau Aphorisms* (1931), section 26.

Abstract

New forms of solidarity in the light of John Paul II teachings

After specifying the sense in which it is necessary to talk of new forms of solidarity, the essay focuses on the fundamental contribution of Pope John Paul II to the updating and expansion of the reach of Catholic Social Teaching. Particular attention is then devoted to explicating the notion of humanistic management, whose main target is to overcome the shareholder value myth: profit maximisation is not the only purpose a corporation should aim at. The paper then proceeds to define the category of Common Good and to show the proper relation between it and the principle of solidarity. The final section deals with some of the most urgent changes that need to be implemented in the institutional set-up of present-day market economies if one wants to arrive at an economy that is inclusive and not excluding, humane and not dehumanising, caring for the environment and not despoiling it.

Keywords: solidarity, Catholic Social Teaching, humanistic management, common good, decent work, subsidiarity

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On the globalization of the idea of solidarity

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Solidarity, Marxist and utopian communism

The word solidarity belongs since the beginning to the language of Christian Social Doctrine.[1] We find it also at the beginning of the Workers Movement in the thought of Wilhelm Weitling.[2]

Oddly enough this idea does not enjoy the heartfelt support of marxists. In the Communist Manifesto[3] Marx explains that this idea is based on the presupposition of an original bond among men that is attacked by modern individualism and capitalism. This bond is religiously motivated: the existing social order is measured with the metre of the Gospel or of Christian Social Ethics and is found wanting. Exactly for this reason, the communism of Weitling is not progressive and revolutionary but rather conservative and reactionary. He would like to restore the medieval social order against the bourgeois revolution.

Marxist communism, on the contrary, welcomes the destructive traits of the capitalist revolution: it destroys all the bonds among men, all the bonds that keep society together: family, village or neighbourhood community and, first of all, religion. Man is reduced to complete isolation; he becomes just an isolated individual, an enemy of all others and struggling for his own survival and his own pleasure. The existing capitalist system, however, grants

1 See: Pontifical Council for Justice and Peace, *Compendium of the social doctrine of the church*.
2 See: W. Weitling, *Garantien der Harmonie und Freiheit*, 1842.
3 See: K. Marx, F. Engels, *Manifesto of the Communist Party*, 1848.

him very scant occasions for pleasure and, in the end, no chances of survival. In front of the incapacity of the system to guarantee its own reproduction, the atomized and individualized workers become united by the need to struggle together against the existing system and to establish a new communist one. The unity of the workers arises on the purely materialistic basis of the hatred of a common enemy, that is, of class struggle. This materialistic basis distinguishes the scientific communism of Marx from the utopian communism of Weitling.

The scientific communism however has failed

On the one hand, the advanced capitalist economies have discovered and used self-regulatory systems that allow them to control their crises. The old Marxist theory of the collapse of capitalism has been transformed into the modern theory of the capitalist cycle. On the other hand, the communist revolution has not created a community of free men. The isolated, selfish individuals produced by the capitalist system were not transformed through the revolution into socialist new men, who perceive themselves now as parts of a greater whole. Without the incentive of individual interest, they could be compelled to work only through a strict discipline and a totalitarian social control system. The results were, however, scanty.

The end of history

When communism collapsed in 1989, Francis Fukuyama drew the conclusion that capitalism had definitively won and that we had reached the end of history.[4] The society we live in seems to be a society of isolated individuals, kept together by the selfish motivation of maximizing the consumption levels of each one of them. Everyone lives in his own private, virtual world, and the relations to other human beings are mediated only through contracts. All natural bonds have been dissolved. Materialism has triumphed, albeit in a form different or even opposite to that foreseen and desired by Marx.

4 See: F. Fukuyama, *The End of History and the Last Man*, New York 1992.

The clash of civilizations

The conclusions of Fukuyama have been challenged by Samuel P. Huntington.[5] He sustains that the future will be determined by the clash of different world visions: the Western, the Islamic, the Eastern, and others. History is not a history of class struggles but rather of cultural identities (we could perhaps say of religions). Subsequent events, like the Gulf Wars and the Afghanistan Wars, seem to confirm this view. The world seems to resist the cultural hegemony of consumerist capitalism and of Western irreligiosity.

From the clash to the dialogue of civilizations

Huntington develops his thesis opposing the West to other civilizations. We accept his vision of the primacy of cultural over merely economic factors in history. We disagree, however, on the fatalistic conviction that civilizations must necessarily clash with one another. Pope Francis laboriously explores the difficult path of the dialogue of civilizations. Now we want to investigate the same problem from within our western culture in the context of a world that is becoming global.

Why did communism collapse?

We begin with the following question: what is the reason why communism collapsed? All historical events of that magnitude have more than one cause. The economic inefficiencies of the system had, of course, a great role. They had been there, however, for a long while, and the system had been able to maintain itself. To understand what really happened, we must introduce, however, a factor of a different order.

5 See: S. P. Huntington, *The Clash of Civilizations?*, „Foreign Affairs" 72 (1993) no. 3, pp. 22-49.

Solidarność

This factor was Solidarność. Solidarność consolidated itself in the form of a trade union but was something more than that. In the language of Pope Francis, we can say it was a popular movement. The workers, the intellectuals, the peasants, the students, the housewives... were united not first of all against a common enemy but through the hope of a common good that had to be pursued together. They ceased to be a multitude of isolated individuals; instead, they perceived themselves as a community based on truth and reciprocal trust. They perceived themselves as a nation. They could therefore say: "We, the People."[6] The people of Solidarność were very different from the proletarians of Marx: they were not the result of the dissolution of all communities; their self-consciousness was not merely negative. They had a culture, a history and a religion. This explains more than anything else the feelings of wonder and revulsion of many Western intellectuals in seeing the workers of the Danzig Shipyards parading the images of Our Lady of Jasna Góra. When we recognize ourselves as a people, we do not stand in need of being governed and directed by an exterior authority that stands over and above us. We are capable of self-government and can take our destiny into our own hands. This was the message of Solidarność.

The proposal of a moral society

They did not want to criticize communism from the point of view of the medieval social system or from the point of view of the capitalist mode of production. They measured the existing system of injustice with a purely ethical meter, and they found it insufficient. They dreamed of a just society in which the community of workers could govern itself. This dream has been only partially realized. Poland is today a free and democratic country, and the communist totalitarian system has been superseded. In the sphere of the economy, we have, however, something very different from a self-governing

6 On November 15, 1989, Lech Wałęsa, Chairman of NSZZ Solidarność, delivered a speech to the US Congress. He began with the words "We, the People" borrowed from the preamble of the United States Constitution. See: https://www.c-span.org/video/?9914-1

community of workers. We have a usual capitalist system, and the self-consciousness of being a community is progressively being eroded by the allurements of a consumerist culture.

Did the revolution of solidarity fail?

The old industrial system congregated the workers in enormous factories where they worked side by side. The physical proximity helped to develop a common culture of solidarity. Today the vast majority of people do not work in the industrial sector but in the services sector. They are physically separated from one another and connected through communication systems they do not control. It was impossible to maintain the original spirit of Solidarność in a working environment that underwent such a dramatic change. The temptations of a consumerist culture were, moreover, very difficult to resist for men and women who came out of the communist culture of scarcity. One generation of Poles could feel satisfied with the advantages achieved and unwilling to run further risks. The revolution of Solidarność did not fail but remained uncompleted or was forced for a while to a standstill.

What is the moral and intellectual heritage of that revolution?

I try to summarize what remains of Solidarność in four points:

1. The existing social system can be measured with a moral meter.
2. An ethical mode of production in which the community of the workers has a central role in the social construction is possible.
3. The subject of change is not the product of material forces but of a self-conscious educational process.
4. The workers' movement and the demand for a critique of capitalism do not die with the end of communism. The new critique of capitalism, however, cannot be materialistic but must be ethical and religious.

Solidarity as the social side of the idea of communion

Let me draw your attention to point 3. At the basis of Christian doctrine stands the idea of communion: through participation in the Body and in the Blood of Christ, the disciples become one with Christ and one with one another. They (should) acquire a communion personality in which the good of the individual encompasses the good of all other human beings. I cannot determine my own good against the good of my brothers and sisters or put within brackets our participation in a common humanity. Solidarity is the social side of the idea of communion. I shall not say that Christianity is the only source of a communion personality or of a just social order. Similar conclusions can be reached starting from different philosophical or religious presuppositions. It is, however, impossible to develop a conscience of solidarity against Christianity or without its active contribution.

The criticism of capitalism of Pope Francis

Not by chance, the main representative of an ethical criticism of capitalism today is Pope Francis. We move then, in one sense, from Marx to Weitling, from a "scientific" materialist to an ethical criticism of capitalism. Is it then completely unjustified, the criticism leveled by Marx against Weitling? Or are we looking for a comeback to a pre/capitalist mode of production? This danger is real and we see it in some forms of ecological romanticism and the corresponding myth of a happy decline. Does the criticism of capitalism today coincide with the impossible dream of making the wheel of history rotate backwards?

The problem Pascal and Solidarity as the moral principle of the criticism of an unjust social order

We find an answer to this question in an old book by one of the founders of the Critical Theory of Society, Franz Borkenau. The book is The Transition from

the Feudal to the Bourgeois Worldview.[7] Borkenau was a Marxist and wanted to classify the different philosophies arising in the years of the transition according to the traditional distinction between reactionary and progressive. He wanted to treat them as the ideological superstructure either of the forces that tried to defend the old order of things or of those that struggled to create the new mode of production. He encountered, however, an unexpected stumbling block: the problem of Pascal. Pascal heeds no nostalgia for the Middle Ages but exercises, nevertheless, an implacable criticism of the new society. He is not the apologist of an identifiable social standpoint. He gives evidence of the fact that philosophy cannot be reduced to a superstructure of an existing social interest. A criticism from a purely ethical and religious standpoint is possible. This standpoint is that of a possible human community in which we make the experience of communion, that is, of belonging to one another in love. This human community is already given; it exists, and we encounter it in the everyday life of families, in true friendships, and in communities. Its existence is, however, partial and fragmented and threatened by social trends that disrupt it and try to reduce society to a mass of unrelated individuals, to a lonely crowd. This purely ethical criticism may indicate the path leading to a better future; it can become the method of the immanent criticism of our existing ideologies and of our existing society. It does not offer us the model of a perfect society but opens up a research programme to see and mend the evils of the society we live in. At the same time, it tells us something about the mode of production of the subject of change. The subject of change is not the Marxist proletarian but, in the language of Pope Francis, the missionary disciple: a man who creates human community, a man who spreads the experience of solidarity. The principle of solidarity, seen in this perspective, is not only the matrix of a fundamental criticism of communist totalitarianism. It is, at the same time, the principle of the criticism of consumerist capitalism.

Use value and exchange value

This criticism will have one point in common with Marxism. This is the doctrine of use value and exchange value. Here, to tell the truth, Marx found an elegant and concise expression for a truth well known since the Middle Ages.

7 See: F. Borkenau, *Der Übergang vom feudalen zum bürgerlichen Weltbild*, Paris 1934.

The goods produced by man serve to preserve human life and to make men happy. This is their use value. With the growing division and specialization of labor, we exchange the goods and services we produce, and we make use, to facilitate the exchanges, of signs of value (money). This is the exchange value. With this splitting of value into use value and exchange value, the possibility is given that we orient social production towards the accumulation of signs of value rather than towards the satisfaction of human needs.

This is what the medievals called usury or greed and Dante Alighieri symbolizes with the she-wolf in the *Divine Comedy*.[8] This is also what is currently taking place in our economies and in our societies.

The constitution of the revolutionary subject

The point on which there is the utmost distance between the "new" and the "old" critic of capitalism or, if you want, between Marx and Pope Francis, regards the revolutionary subject and the modality of its constitution. We have already seen how in Marx the revolutionary subject is the proletariat, a social class of industrial workers that is a product of the economic process and a result of the dissolution of all pre-existing bonds, especially family and religion. That class of industrial workers has lost its centrality in our services economy and seems to be almost disappearing. The revolution based on a purely materialist rebellion could not organize, moreover, a free society. To keep society together, they were compelled to make use of a terroristic control system. In the teaching of Francis, on the contrary, the revolutionary subject is the people. The people are characterized through the experience of solidarity that makes a lonely crowd an organized community capable of self-government. This is the message of John Paul II in Puebla and later of Jorge Mario Bergoglio in Aparecida. The Latin American poor have a culture; perhaps they cannot read and write, and their culture is an illiterate culture, but a culture that contains fundamental values and attitudes in front of life and death, love, work, the dignity of man and the value of the human community. This culture is to a large extent the result of an encounter with the Christian message and solidarity expresses the social dimension or projection of this culture. If we compare the message of John Paul II in Latin America in 1978 and in Poland in

8 See: D. Alighieri, *Divine Comedy*, Part 1: *Inferno*, Chapter 1.

1979, we find that it is fundamentally the same message: the message of solidarity. It is of course declined in different forms: in the first case, it is a challenge to the communist empire of the East; in the second, to the capitalist empire of the West.

Solidarity becomes relevant again...

...because of Covid

A series of events have brought back the issue of Solidarity to the attention of our public opinion in these last years.

One of them is the Covid pandemic. We were used to thinking that everyone lives in a virtual world of his own and that the only mediation between these virtual worlds is a contract. Now we have discovered that we all belong to the same human race and to the same world, and whatever we do influences the destiny of others. Our virtual worlds may be dependent upon contingent rules of the game determined by our arbitrary decisions. The real world is dependent upon natural laws quite independent of our wishes, and the penalty for the transgression of those laws is death. These natural laws tell us that if we do not eradicate the pandemic worldwide, and if we do not vaccinate the people of the poor countries, there will not be safety for anybody. We are rediscovering the concept of natural law, beginning with the natural laws of virology and medical prophylaxis.

...because of Climate Change

Another strictly connected issue is the climate and, more generally, the environmental crisis. Although we can imagine we each live in a world of our own, there is only one real world, and this world is regulated by natural laws we are bound to observe under penalty of the extinction of human life on earth. The environmental crisis highlights one fundamental defect of the current economic system. The production oriented exclusively towards the maximization of exchange value has offloaded for centuries onto society the costs of the consumption and destruction of the environment. The environment is a common good of humanity, but it has been consumed for private purposes

without paying the corresponding costs. Now the whole of mankind is called to pay the price of the external production costs accumulated by private companies in the course of centuries of industrialization.

...because of the globalization of World Markets

A third issue is that of the globalization of the world markets. The Marrakech Agreements of 1994 have given freedom of movement on the whole earth to capital, goods, and services. This has profoundly affected the structure of the world economy. Enormous quantities of capital have been invested in very poor countries where the salaries and the protection of workers' rights were very low. Billions of poor people have had an occasion to work, although for very low pay, and the largest part of Asia has grown and has come out of the geography of hunger. There is, however, also a more problematic side to this globalization of the economy. Many jobs and whole manufacturing sectors have been displaced from the more developed to the newly developing countries, the protection of labor has been lessened, and salaries have ceased to grow. Politics has lost the ability to control the economy. If a government wants to impose higher taxes to provide the poor with better education, to improve the health service, or to ameliorate the living conditions of the workers, the wealthy can easily move their capital to another country that offers them better conditions. This shift is further facilitated through the enormous growth of international electronic transactions. In the same way, big companies can blackmail governments that try to implement more ambitious regulations for the protection of the environment.

...because of the need to protect labor on a world scale

A fourth issue is that of the protection of labor at a world level. In 1994, the General Agreements on Tariffs and Trade started the globalization of the world economy.[9] Now we need a Global Agreement on Wages and Labor for the globalization of workers' rights and the defense of the rights of labor. It will not be easy. The wage gap is the fundamental competitive advantage of the countries that are coming out of poverty. The abrupt introduction of equal

9 On 15 April 1994, the Agreement establishing the World Trade Organization (WTO) was drawn up in Marrakesh. See: https://www.wto.org/english/docs_e/legal_e/marrakesh_decl_e.htm

pay would destroy their economies. We have to imagine the modalities of a progressive rapprochement that takes into account an infinity of subtleties and differences. It was no different when they started the negotiations for the General Agreement on Tariffs and Trade or those for the struggle against climate change, and we can expect that negotiations will be equally difficult and will take their time. This is, however, not a good reason not to begin. A first step could be a guarantee for the liberty of workers worldwide to organize independent trade unions.

A related but distinct problem exists within the European Union: in different member states, workers who possess identical skills and perform identical tasks for the same company are treated in hugely different ways.

A demand for global governance

All these four examples highlight one point: we need global governance to face the global problems of our time. This is one of the central points of the encyclical *Caritas in Veritate* by Benedict XVI.[10] A global governance is not a global government. It is a common exercise of sovereign powers by the governments of independent states in situations in which sovereignty can really be exercised only together. In a globalized world, we need a globalization of politics. If this does not take place, the states will lose their sovereignty, and this will mean the end of democracy. We have already seen that, if they act in isolation, the states have lost their fiscal sovereignty. They cannot tax the wealthy to practice redistributive policies in favor of the poor. They have also lost the ability to protect the environment. They are losing the ability to protect the expression of the political will of their peoples in free elections. A limited number of monopolists control the principal channel of information and political debate that is the Internet. They can easily manipulate the electoral results because the people decide and vote on the basis of the information they have, and if the information is manipulated, so too will the outcome of the elections be. They cannot guarantee the protection of the workers of their countries in the rapidly evolving world labor market of our time.

10 See: Benedict XVI, Encyclical letter *Caritas in Veritate*.

A demand for popular movements

The fact that we need a global governance does not mean that we will have one. The objective need is not enough if we lack the subjective determination and will. As a rule, when this point is considered, an appeal is made to inspired leadership. Pope Francis, however, seems to see things from a different perspective. He makes an appeal not to a kind of Superman or to a group of great personalities but rather to broad popular movements: great leaders can only arise out of a profound change in the consciousness of our peoples.

We need global movements that make public opinion aware at a world level of the necessity of a common action. We need to balance the globalization of the economy with a globalization of political and ethical concerns. We need to give globalization a human soul.

We need to rediscover at a global level the spirit of Solidarity

Solidarność at the beginning of the '80s was a trade union, but it was also something more than a trade union. It was, at the same time, a national movement. Now we need a world movement of Solidarity that continues on a world scale not only the tradition of Solidarność but also the struggle of the world's workers' movement for social justice. Some thought that after the collapse of communism, the workers' movement had also lost its justification and its essential motivation. On the contrary, in this new stage of world history, the struggle for justice has to be continued and enlarged, encompassing the whole earth and extending its reach beyond the defense of the rights of labor. It is a struggle to put the human person at the center of society in all its dimensions. Science and economy must be put in the service of the human person, and the human person must not be reduced to an instrument for the accumulation of capital. This is the ethical imperative of a moral economy, and this conviction seems also to stay at the center of the message of Pope Francis.

The market must serve the common good of the city

We want to recognize the positivity of the market and of market forces and especially the moral and economic value of entrepreneurship. It unleashes human creativity to find new and better ways to satisfy human needs, to enlarge human welfare and the productivity of human labor. The market, however, is not a self-sufficient reality, closed within itself. It is a part of a broader society in the same way in which the market square is a part of the city. In the city, the goods exchanged on the market are consumed for the benefit of human life. The market must be put in the service of the city, and the exchange value must be put in the service of the use value. This was also a main tenet of the so-called Social Market Economy.

The search for a better society continues

After the collapse of Communism, history continues. It cannot go back to the past, but it would be a defeatism of reason to forbid the research for a new and better form of organization, both of economy and society. Capitalism is better than communism; it is, however, far from constituting a perfect society. All the progress of the last decades notwithstanding, extreme poverty has not been eradicated, and roughly 10% of the human beings living on this earth survive on the verge of starvation. Many more struggle to make ends meet, with few or no prospects of bettering their conditions. In the affluent countries, many people, especially young people, live in a condition of alienation, consigned to "frittered lives and squalid deaths..." Can we really be satisfied with the present state of affairs?

The revolutionary subject

Who is the adequate subject for the change that we as mankind are called to perform in the coming decades? We have already highlighted the role of the Popular Movements. Movements, however, are made by men. What is the

kind of man who can help mankind enter into the new phase that opens up in front of us?

The recovery of objective truth

The capitalist man is a relativist: he pretends to live in a world of his own and to abide by his own truth. In the last few decades, we have seen a growing persecution of the idea of an objective truth that is binding for all human beings. The urgency of our time is to recover the idea of objective truth. In many countries, there is now a stubborn resistance against the prophylactic measures proposed (and sometimes imposed) by public authorities in order to protect public health. Few have noticed that the so-called "No Vax" (anti-vax, no vaccination) is a pure expression of the ideology that has been dominating until the very recent past. They oppose their subjective truth to the objective truth represented by the legislators backed by the scientific community. If we want to preserve the earth, we all have to continue along this path. We will need to recover the idea of natural law in the cosmological as well as in the moral order. The man of tomorrow must be able to recognize a natural law and abide by it.

The recovery of the community

The capitalist man is an individualist: he inhabits his own world and sees reality from the point of view of the maximization of his particular interest. He wants to belong only to himself. The man of tomorrow must be a man who sees that freedom is useless without love. Freedom has the function of allowing persons to recognize one another, to displace their emotional center from the prison of their restricted and selfish individuality towards a bond connecting them to one another and allowing them the transition from an I to a we self-consciousness. We can take care together of the earth and also of our particular political community only if we can create together with others a community that is adequate to the task in front of us.

The self consciousness of the person

The most important and all-encompassing issue is then the reconstruction of the human community, beginning with the self-consciousness of the person. If we look at this concept in depth, we understand why Pope Francis insists on considering these issues as pertaining to the mission of the Church. Through them, the idea of Communion becomes concrete. On the other hand, this is the service of the Church the world stands in need of: the education of Communion personalities that aggregate communities: family communities, workers' communities, national communities, the community of humanity as such. Only through the construction of vibrant communities can the person be put at the center of the social order, and humanity be able to pursue her common good on Earth.

Abstract

On the globalization of the idea of solidarity

Solidarność in Poland was not merely a revolt against communism or a move towards capitalism but a Popular Movement advocating for a moral society centred on human community. However, subsequent developments in Poland and Europe have overshadowed this goal, replacing it with the extension of consumerist West European culture to former communist states. The vision of a moral society critiques both communism and unbridled capitalism, suggesting the failure of communism marks not the end of history but the start of a search for more humane ways of life. Today's dominant social structures face multiple crises: COVID-19, environmental degradation, globalisation, and the erosion of workers' rights. Addressing these requires global governance and, more importantly, a shift in self-awareness—from individualistic and narcissistic to personalistic and communitarian. We must regain the sense of being a communitarian subject, respecting objective laws for the common good. This represents the globalisation of solidarity's ethos.

Keywords: solidarity, community, consumerist culture, moral society

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The rise of philosophy of Solidarity in Poland

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In this article, I attempt to describe the crucial moments that propelled the emergence of a new cultural phenomenon, namely the Solidarity movement, in the Polish socio-political space. I discuss both the evolution that the Polish workers underwent in their successive revolts against the Communist authorities and the influence of the Polish intelligentsia, largely represented by Catholic thinkers, on this evolution. I point to the sources of evangelical inspirations that, thanks to the activities of Karol Wojtyła and Józef Tischner, appeared in the shaping of the Solidarity movement. Against this background, I outline the development of the moral philosophy of solidarity in the period of spontaneous collaboration between the workers' elites and Catholic philosophers (primarily Tischner) and the subsequent gradual departure from the ethos of solidarity during martial law and in the period of the political transformation after 1989.

Between practice and religion: existence precedes essence

The phenomenon of solidarity which appeared in 1980 seemingly out of nowhere was not the result of a social contract. The agreement between the Communist government of Poland and the Strike Committee of "Solidarity," signed in August 1980, was the culmination of the activities of various social groups over many years. Thanks to numerous uprisings and the involvement of a growing number of members of different social circles, the efforts of

Polish society were united and a new quality was created in the national space previously dominated by a totalitarian state. Thus, it seems worthwhile — at least briefly — to trace the decades-long evolution of the Polish revolution as it put forward increasingly universal demands to the Communist government ruling Poland.

This evolution was initiated in 1956 by workers from Poznań, who demanded economic changes for Polish society. They protested mainly against the rapidly rising food prices. Then came the 1968 student protests. Students demanded the implementation of those democratic values enshrined in the Polish Constitution: freedom of speech and respect for the dignity of those who held differing opinions. They were aware of the façade of the Soviet-controlled "people's democracy," which they opposed. One of their demands, which returned years later in a modified form, was "be realistic, demand the impossible." This revolt was suppressed with the help of, among other entities, workers who — being manipulated by the authorities — brutally pacified the student "rebellion." Soon after, in December 1970, again as a result of the dramatic increase in food prices, a workers' revolt began in Gdańsk. Students and intellectuals — who remembered the workers' brutal intervention two years before — did not support this bloodily suppressed revolt. The breakthrough in this wedge of distrust came several years later, in 1976, when Radom and Ursus became the sites of another workers' revolt against the authorities. Workers who had been persecuted after these proceedings were supported by the participants of the 1968 events. These individuals had set up independent organisations — such as KOR (Komitet Obrony Robotników/Workers' Defence Committee) or ROPCiO (Ruch Obrony Praw Człowieka i Obywatela/Movement for the Defence of Human and Civil Rights) — which provided legal and financial support to workers wronged by the authorities. Thanks to such organisations, the opposition was able to establish increasingly close cooperation with workers.

The Poles waited until 1980 to organize another revolt. This moment was preceded by two significant events: the election of Karol Wojtyła to the Papal Throne and his first pilgrimage to Poland in 1979. Pope John Paul II's words "do not be afraid," addressed to a crowd of thousands gathered at Krakow's Błonia Park, marked the beginning of a spiritual change in Polish society, which touched a large number of its people and undoubtedly inspired the spontaneous birth of the Solidarity movement a year later. This upsurge of solidarity

unexpectedly turned into a social revolution, which came as a surprise to its inspirer and to the entire Catholic Church. It seemed that the new movement had the power to transform even the entire world; it certainly offered hope for the *transformation* of this world.

It is worth understanding how — between 1956 and 1980 — the workers' claims and demands changed as a result of the aforementioned interactions with intellectuals and members of the Church who belonged to the opposition. Until 1976, all of the workers' revolts were economically motivated. In 1956, the workers demanded that the authorities withdraw their imposed labour standards, lower prices, and increase wages. The same events happened again in December 1970 and June 1976. The intellectual elites and the Church had a negligible presence in organising these revolts and in formulating the workers' demands. However, in 1976 in Radom, the workers had "their own" church "guardian," Father Roman Kotlarz, who was later murdered by the Security Service. In the following years, the aforementioned opposition organisations organised educational activities for the workers and held discussions and lectures as part of the "Workers' University." An important role here was played by members of the Catholic intelligentsia, who supported these initiatives and allowed their organisers to use the premises of the Catholic Intelligentsia Clubs. Their rooms and the lecture rooms that belonged to the Church were among the few public spaces in which a free and unhindered exchange of ideas could take place. This exchange was essential for the survival of the movement, for bringing together people with different visions, and for developing common projects for the future.

These initiatives led to a significant expansion of the demands made during the Solidarity revolution in 1980. The demands went far beyond purely economic requests and included the authorities' consent to the creation of independent trade unions, freedom of speech, access to the media for representatives of all religions, the release of political prisoners, and the abolition of political repression for one's convictions. Other demands called for the improvement of working conditions in the healthcare sector, to provide an adequate number of nurseries, and to introduce paid maternity leave. Thus, the economic demands were accompanied by social and political requests. Furthermore, it was not the demands themselves that were important, but rather everything that accompanied both the beginnings of the movement and the protests. It is worth recalling that one of the main reasons for the workers'

strike was the dismissal of a gantry crane operator, Anna Walentynowicz. Her reinstatement was part of the initial demands of the striking shipyard workers, and, to some extent, it became a symbol of the new movement. The thousands of workers who stood up for the wronged woman undoubtedly stirred the imagination of all those who decided to join the movement.

Another important feature of the new rebellion was its peaceful nature, as well as the emphasis on religious elements, references to the message of Pope John Paul II, and requests for the church authorities to send priests to the strikers to provide them with spiritual support. The Eucharist played an important role in building community among the workers. The desire to participate in the Eucharist motivated crowds of the striking workers to go to confession before Mass was said. Many priests — led by Father Jerzy Popiełuszko — became spiritual leaders of the "Solidarity" movement, proclaiming the truth of human dignity and ensuring that all actions conducted were based on moral law as a guarantee of promoting both social order and economic development.

It should be mentioned here that, despite several decades of communism in Poland, the Poles' religiousness and attachment to the Church at that time remained very high. A community of values and the work of overcoming fear through joint action became the stable foundations for the emergence (in August 1980) of a new socio-cultural phenomenon, which gave rise to the ethos and philosophy of solidarity. The long-lasting process of labourious maturation and the adequate manifestation of this movement, which would go on to influence the future shape of free Poland, was completed. The workers who took part in suppressing the student protests in March 1968 needed such maturation. Similarly, the students also needed it during the 1970 events in Gdańsk and those of 1976 in Radom. The students' slogan "Be realistic, demand the impossible" was implemented by the workers, who were now supported by former student rebels.

The emergence and success of the new movement were a surprise not only to the communist authorities but also to one of its main inspirers. Father Józef Tischner, who stayed at Castel Gandolfo in August 1980, wrote: "We were having dinner with the Pope when Italian television showed pictures from Gdańsk. The gate of a striking shipyard. A crowd of people. Bouquets of flowers stuck on the rails of the shipyard fence. The camera zooms in on the gate and among the flowers a portrait of John Paul II is seen. And the Pope is

sitting next to me. He hunched up. He did not say a word. We also fell silent. It was not yet clear how it would all end. It was generally believed that it was him who initiated all this. On the other hand, there was also hope that because His portrait was there, a portrait of the Pope, people would not kill one another."[1] Hope is probably the most important word to describe the source of solidarity that emerged "out of nowhere."

It suddenly turned out that everyone was dreaming of a world better than the one around them. The whole nation was united in this dream. Unexpectedly for everyone, a common bond emerged and showed each isolated member of the community that other members of society were holders of the same values and dreams, all of which had been previously hidden from others out of fear. Solidarity, through a sense of identity, created a bond that transformed the previous collection of individuals into a unity that was more than the sum of its parts. A social group that equated itself with the idea of solidarity was a separate entity guided by ethical norms and values. Duty, obligation, and a sense of shared responsibility for common goals bound this unity, gave its members a sense of strength, and allowed them to believe that what had seemed impossible a while ago was now within their reach.

In 1980, solidarity offered to each person what they wanted, what reflected their longings, and that meaning which was dear to them. This is not difficult in that kind of situation in which no goal seems possible to realise — in such situations, any hope is a hope. In comparison with the harsh reality of Edward Gierek's socialist rule, any idea other than the officially decreed one must have seemed attractive, let alone an idea that was brought into social consciousness by workers who were supported by genuine, authentic intelligentsia. In this atmosphere, everyone had to find some element of their own longing, and thus to give the idea that had appeared "out of nothingness" his or her own meaning. Solidarity was, above all, a polyphony. Yet, it was also — at the same time — ambiguity. Each of us understood it the way we wanted to understand it. It was an ambiguity similar to the one which appears when two people declare their love for each other, but each understands the concept of love in a different way. Solidarity in 1980 was as unreal as a dream. At the same time — as a dream come true — it was anticipated to accommodate the expectations of ten million Poles. It was John Paul II's friend, phenomenologist Reverend Professor J. Tischner, who, as if by accident, attempted to grasp

1 W. Bonowicz, *Tischner*, Kraków 2002, pp. 323-324.

this ongoing phenomenon and transform it in such a way that it would fit into a philosophical framework. He understood solidarity as a challenge for an ethicist and — in his first sermon delivered at Wawel Cathedral in Kraków to the leaders of the new movement — formulated the first principles of the ethos of solidarity, emphasising that the most important ones are the "solidarity of conscience" and the evangelical imperative: "Bear one another's burdens."

Tischner developed this interpretation of solidarity in his book on the ethos of solidarity (The Ethics of Solidarity), and many of his ideas found their way into the teachings of John Paul II. However, the crucial thing was that the foundations of the philosophy of solidarity were formed on the basis of the actual meetings held with the creators of the movement. As Tischner himself emphasised, "first a real event, and then my philosophical commentary."[2] In this way, his phenomenological method followed the dynamically forming reality (of which philosophers had not dreamt before) and defined the possible directions of its development.

The person and participation

Before we move on to a philosophical reconstruction of the solidarity that was happening and developing in Poland, it is worth moving back several years to Karol Wojtyła's views on solidarity that were expressed in his most famous philosophical work, *Person and Act*. It is an important book because it was known and widely commented upon by the intellectuals who inspired the actions of the workers, and it also greatly influenced J. Tischner's views.

Karol Wojtyła, as a personalist, emphasised that the human person possesses natural dignity and unique individuality. At the same time, he observed that the person is not a "being-for-himself,"[3] because man's vocation is action and self-realisation. These can only take place "together with others," through co-existence and cooperation.[4] He emphasised that freedom is the source of human dignity; freedom is not, however, absolute freedom, as it is limited by a consideration for other people as individuals who are also endowed with the same dignity. He complemented his personalistic concept with the thesis

2 J. Tischner, *Solidarność sumień*, in: J. Tischner, *Etyka solidarności oraz Homo sovieticus*, Kraków 2005, p. 6.

3 K. Wojtyła, *Osoba — podmiot i wspólnota,* "Roczniki Filozoficzne" 24 (1976) no. 2, p. 13 (5-39.)

4 K. Wojtyła, "*Osoba i czyn" oraz inne studia antropologiczne*, Lublin 1994, pp. 294-251.

that man fulfils himself through others and realises himself thanks to them. In order to become himself, man must participate in the life of the community by acting for the common good. The common good is "above all that which conditions and, as it were, liberates participation in persons acting together and thus forms in them a subjective community of action." [5] The common good is the axiological foundation of community building. Participation is only realised "when a person enters into a specific relationship with other persons and the common good."[6]

Karol Wojtyła stressed that "participation as a feature of the person constitutes the fact that, by acting 'together with others', the person fulfils an act and fulfils himself in it." On the same page, he added that "Action — synonymous with an act — under certain conditions can turn into *passio*, into happening, which in some people occurs under the influence of others."[7] Twenty years later, Pope John Paul II's "action" changed through his "influence" into "happening," which resulted in the creation of the "Solidarity" movement.

The future Pope stated that participation can manifest itself through solidarity and opposition. By adopting an attitude of solidarity, the subject identifies himself with the common good of the community to which he belongs. He treats this good as his own and tries to invest all his potential in its implementation. However, if he considers the way in which the common good is realised to be inadequate, then the subject adopts an attitude of opposition.

As Wojtyla explained: "Solidarity means constant readiness to accept and realize the part which belongs to each person by virtue of being a member of a particular community. The man of solidarity not only does what is due to him as a member of the community, but does it for the good of the whole, that is, for the common good. [...] An attitude of solidarity does not, however, exclude the possibility of opposition. Opposition is not essentially at odds with solidarity [...] we understand opposition essentially as an attitude of solidarity."[8] Ostensibly, as Wojtyła detailed, "people who oppose do not wish by this to leave the community. On the contrary, they are looking for their own place in this community — they are looking for participation and such an understanding of the common good that they can participate in the community

5 K. Wojtyła, *Osoba i czyn*, p. 317.
6 J. Galarowicz, *Człowiek jest osobą. Podstawy antropologii filozoficznej Karola Wojtyły*, Kęty 2000, p. 275.
7 K. Wojtyła, *Osoba i czyn*, p. 310.
8 K. Wojtyła, *Osoba i czyn*, pp. 323-324.

better, more fully, and more effectively."[9] At this point, it is also worth noting that the concepts of opposition and solidarity as forms of participation were implemented in 1980.

Let us emphasise that what was meant here was *authentic* participation, in which the other person(s) is(are) the goal of an action. The other person is a being endowed with an interior, a personal subject, a *neighbour*. The concept of *neighbour* is linked to the value of the person as such and is independent of social references. It appears to us as the real good. With such a reference, authentic attitudes are formed, such as solidarity and opposition. However, if the goal of an action is one's own interest, the other person becomes more of a competitor than a neighbour. Then, instead of working together for the common good, the members of a community begin to compete with one another. By separating his own good from the common good, such a citizen "somehow accepts that the community is taking him away from himself. At the same time, he takes himself away from the community."[10] In consequence, he alienates himself from the community and, at the same time, alienates himself from the sources of his own humanity. He deprives himself of the possibility of experiencing his own humanity in its fullness and of establishing the relationship of solidarity and community with other people — a task for which he was created by God.

The inauthentic participation which manifests itself this way has two forms: conformism and avoidance. A conformist may support an authority if he sees in it his own advantage, or he may adopt an attitude of avoidance when he considers that it is disadvantageous for him to support the authority in question. There was no shortage of such attitudes in Communist Poland, as was aptly diagnosed by Wojtyła. At the price of a "small stabilisation," substitutes for prosperity and privileges were distributed according to the principle of "divide and rule." The vast majority of society was pacified, and at the same time, it was prevented from experiencing genuine participation in community life.

It seems that the ideal of authentic participation which had the power to terminate alienation, was first implemented in 1980 by the Solidarity movement. With this, J. Tischner, Wojtyła's friend and a personalist himself, became its main philosophical proponent.

9 K. Wojtyła, *Osoba i czyn*, p. 325
10 K. Wojtyła, *Osoba i czyn*, p. 317.

An ethicist's dream come true

The basis of Tischner's reflections, which were conducted in the spirit of personalism as early as the 1970s, is the axiological Self. With this, "is" (because it is "given") and "is not" (because it is yet to become) exist at the same time.[11] It bears universal value and validity, which are expressions of its dignity. The claim to the validity of the Self manifests itself through a commitment to being recognised by others.

The *social* Self is a field of external influences for the *axiological* Self and determines the scope and direction of its free moral choices. However, freedom is not a fundamental feature of the human individual, as positivists claim, but rather the foundation of all human relations: it can be said that it is the good that should be shared with others. Such freedom does not exist in one person or another, it exists between people. Tischner explained: "my freedom as my secret is freedom *among* other freedoms, freedom with people, next to people, for people."[12] The axiological Self does not exist independently and could not develop independently. Its freedom cannot be imagined without the co-participation of others. It is not even conceivable that man would be able to find his way to freedom without the help of others.[13] To make this journey, he needs Others. The other person, however, does not determine his choices, but rather inspires, supports, or disagrees with them. That is why the Self strives to meet another will with which it can take joint action. Here, in the encounter with the other, a dialogue takes place wherein the participants "come out towards each other"[14] from their hiding places and meet, shed their fears, and shake hands.[15] The other person brings his own spiritual initiative to the joint venture; it is something different but "in solidarity" with the aspirations of the Self. The other person is also indispensable for confirming the rightness of one's chosen path and for confirming one's own value, at which point both participants of the dialogue become an inspiration to each other.

11 J. Tischner, *Zarys filozofii człowieka*, Kraków 1991, pp. 161–162.
12 J. Tischner, *Ksiądz na manowcach*, Kraków 1999, p. 274.
13 See: J. Tischner, *Polski młyn*, Kraków 1991, pp. 254-255. See also: J. Tischner, A. Michnik, J. Żakowski, *Między Panem a Plebanem*, Kraków 1995, p. 290.
14 See: J. Tischner, *Filozofia dramatu*, Kraków 1991, p. 112.
15 See: J. Tischner, *Etyka solidarności*, pp. 6-7.

Encounter and dialogue give rise to understanding and empathy. This, in turn, allows for understanding the needs and expectations of the other person, but also noticing one's own possibilities. From this, solidarity is born. "What does it mean to be in solidarity? It means carrying the other person's burden. No man is an island entire of itself. We are united even when we do not know it. We are united by landscape, united by flesh and blood — united by work and speech. We are not always aware of these connections. When solidarity is born, consciousness is awakened, and then speech and words appear — and then what was hidden comes to light."[16] It is in these relationships that the common moral good is created. The community creates us and makes us what we would like to be — better people.

St. John Paul II later added: "'Bear one another's burdens', this succinct sentence of the Apostle (Saint Paul) is an inspiration for inter-personal and social solidarity. Solidarity means one and another, and if burden, the burden borne together, in community. It is never one against another; ones against others. And never a 'burden' borne by man alone, without the help of others."[17] Both Tischner and the Pope emphasised that man is always in solidarity with someone and for someone. Thus, the idea of solidarity illuminates the spaces of social, political, economic, and individual life.

Despite these ideas, it is important to realise that a community alone was not enough to create (or explain) the solidarity of the kind that happened in 1980. Spontaneous solidarity, the kind which is open to all and does not turn against anyone, must have a deeper foundation. Neither human dignity nor "the other" is enough here, as Tischner emphasised. Such solidarity is not an abstract idea. The stimulus for its emergence is the cry for help of a person who has been wronged by another person. Solidarity thus establishes a special interpersonal bond: a person binds himself to another person in order to care for the one who needs care. The community of solidarity does not appear out of nowhere and for its own sake, but always emerges to help the other person. In referring to the Gospel, Tischner explained it this way: first, there is the injured person and his cry. Then, there is a conscience, which can hear and understand that cry. Only then does a community of solidarity appear.

16 J. Tischner, *Etyka solidarności*, pp. 8-9.

17 Excerpts from John Paul II's sermon delivered during the Mass for workers in Gdańsk on 12 June 1987.

In this view, solidarity is a fundamental form of human cooperation, and the good Samaritan is its symbol.[18]

Tischner, who observed Solidarity's changes from a close view while spending time with the people who created the Solidarity movement, defined the ethics of the emerging Solidarity as the ethics of conscience. Conscience is, in his view, man's natural "ethical sense". It is largely independent of various ethical systems and is even prior to these systems. Authentic solidarity, therefore, manifests itself through the solidarity of conscience. To "be in solidarity" means to always be able to count on man, and to count on man is to believe that there is something constant in him that will not let us down. Conscience, then, is that which is constant, insofar as one listens to its voice. It can happen that someone renounces it. Nonetheless, it also happens that a person who has renounced his conscience can rebuild it, or rather awaken it within himself. A collective awakening of conscience, as Tischner stressed, was the beginning of the moral and social revolution of solidarity.

The protest of people who had been wronged by "the system" initiated a movement which, by awakening consciences, demanded that fundamental human rights and the principles of justice be respected. However, and this is vital, Solidarity did so peacefully, without any desire for retaliation or revenge. It called not for the removal of those who inflicted wounds, but for an encounter with them, for dialogue, and for a common discovery of the truth that sets us free. Here, another evangelical theme in the philosophy of solidarity appears, one which Tischner developed and introduced into the ethos of solidarity: conquer evil with good. There can be no retaliation for the evil done because the vicious circle of evil must be broken. Man is free and can choose to respond to evil with good, to see in others a neighbour who, like him, is prone to error, but who also like him, needs understanding and a helping hand. A cold calculation of reason is not enough here because we enter an emotional sphere, which establishes its own relationship between people.

"Solidarity is closeness — it is brotherhood..."[19] Tischner observed. Love, friendship, compassion — all of these are feelings that most fully reveal the closeness between people and introduce a new meaning to the term "brotherhood" — in which "A man is a neighbour to man." Therefore, he interpreted the universal power of solidarity as a new name for social love, which is

18 See: J. Tischner, *Etyka solidarności*, pp. 6-7.
19 J. Tischner, *Etyka solidarności*, p. 16.

a thoroughly evangelical value. Love, as Tischner emphasised, speaks the language of goodness; it is also an ultimate union between happiness and misfortune. Of course, solidarity can do without conscience and love. If someone in the crowd throws a stone, an avalanche follows — this, too, is a reflex of solidarity, but in this very human reflex, there is no reflex of conscience, nor is there love. Therefore, Tischner observed that, in order to prevent solidarity of conscience from turning into solidarity without conscience, it is necessary to "conquer evil with good." Here we go beyond the economic order, beyond the rationality derived from the Code of Hammurabi, and finally — beyond wisdom in the narrow sense. Wisdom is associated with establishing facts, with making diagnoses, with assessing the burden, and with the capability to bear it. Nonetheless, these are values that are impossible to assess, especially when rational discourse involves love, which "ignites from another good, like a dry wick too close to the flame."[20]

In the name of such solidarity, and filled with love for one's neighbour, the individual should be ready to make sacrifices, all the while being aware of his responsibility for the other and for his "burdens." As Tischner wrote "Work, study, and leisure make sense when they are linked to the service of the neighbour. 'I have come to serve and to give my life' — says Christ. This is how Christianity inspires our love for neighbours."[21] J. Tischner developed such an evangelical understanding of the idea of solidarity that John Paul II spoke of such solidarity, and — decades ago — the social movement "Solidarity" was permeated with the spirit of solidarity. It is, however, an attitude that is in stark contrast with the contemporary lifestyle, which fuels our egoism and which, as not only Christians can see, empties the soul.

From ethics to economics

The Solidarity movement's hopes for the creation of a better, ethical society lasted for several months, from August 1980 to December 1981. This time was interrupted by the declaration of martial law, the presence of the army in the streets, the internment of the movement's leaders, and the pacification of social protests. Although in the following years, a large part of society and

20 *Maleńkość i jej mocarz*, [in:] J. Tischner, *Miłość nas rozumie*, Kraków 2002, p. 169.
21 *Trzy zasady naszego stosunku do bliźniego,* [in:] J. Tischner, *Jak żyć*, Wrocław 2000, p. 81.

many activists who had gone underground cultivated the ideas of Solidarity's ethos, new forms of activity and enforced restrictions led to changes in the understanding of solidarity.

As Tischner emphasised after the fall of Communism in Poland, "the ethos of solidarity, apart from anything else, was an expression of the deepest human and also Polish hope. However, in order to understand the meaning of the «ethos of solidarity» more fully, it is good to look at it through the process of its decomposition. [...] And the decomposition has indeed taken place."[22] The declaration of martial law made distrust reappear and, with it, people in the now- underground Solidarity returned to their hiding places. These were the people who began to transfer their fears, illusions, ambitions, and increasingly particularistic interests to the movement that had arisen in the name of the moral renewal of society as a whole. In the underground community, universal thinking was replaced by a war rhetoric that had been imposed by the communists. The perception of society as a community was replaced by a division of "Us-the good and Them-the bad" fault lines. Such a perception persisted long after the collapse of communism.

Another change in the understanding of Solidarity could be observed after the Poles regained their freedom and underwent the political transformation from Communism to capitalism. Tischner often described "Solidarity" as a community of workers striving to liberate work from the burdens and sufferings caused by another human being. Understood in this way, "Solidarity" was to take action to ensure that work served life, human development, the good and well-being of the whole, gave it a deeper meaning, offered dignity to people, and ensured mutual cooperation and understanding. In this view, work is a value in itself; it is not reduced to merely the production of material goods that satisfy various needs. The lack of such work gives rise to an inauthentic life — a life of fear, suffering, exploitation, harm, and withdrawal into oneself.[23] Tischner stressed the role played by the moral dimension of human relationships and work. He saw *dialogue* as the model for properly understood work: "Work is a special form of conversation between man and man. The product of human labour grows out of understanding and serves understanding."[24] At work, we communicate. In order to produce the fruits of

22 J. Tischner, *Etyka solidarności po latach*, [in:] J. Tischner, *Etyka solidarności*, p. 263.
23 See: J. Tischner, *Etyka solidarności oraz Homo sovieticus*, Kraków 1992, p. 23.
24 See: J. Tischner, *Etyka solidarności*, p. 24.

our work together, we exchange our experiences, we develop one another, we care for the other and for good relations, and we strive to build and maintain a good atmosphere in the workplace. Work, from this perspective, is a special form of conversation between two persons that is conducive to the development of human life and the development of society.

In this concept of labour, which was also developed by Saint John Paul II, the idea that is still valid and valuable is that work should be dialogical, should restore human dignity, and must not lead to the debasement of man, as was often the case in factories run by capitalists at the end of the nineteenth century or in modern corporations whose target is maximum profit at the cost of man's exploitation. However, after 1989, a liberal understanding of work prevailed. Within this idea, work was defined in purely economic terms. The new working conditions of modern times are highly diverse and, although they offer a number of opportunities for development, they also pose the threat of new forms of alienation — which ultimately lead to new forms of enslavement of man. In the liberal model, work is detached from the value of the person. As Tischner noted with resignation: "The rejection of slavery and the choice of freedom were guided primarily by economic considerations. Economic success, rather than the ideal of authentic humanity, became the measure of freedom."[25]

A new project of solidarity, one adapted to the changing times, was missing in the new reality. The liberal market economy promoted individualism and encouraged people to strive to become richer. Anyone who was poor was considered to be a failure, to be someone who could not adapt to life in a free country. The cry of the needy was equated with a "claimant" attitude. Solidarity was transformed into a community of interest groups. There was no call for selflessness. People who were guided by the virtue of solidarity were regarded as weak and as obstacles in successful competition — the aim of which is, after all, to eliminate weaker rivals and to win, not to help others. Solidarity of conscience and its call to "bear one another's burdens" became ideas ill-suited to the new reality. The unity of a community freed from communism was replaced by a never-ending "war at the top," in which the activists quarrelled with one another and divided society.

Yet, at the same time, those who were unable to cope with the new challenges created new forms of solidarity or were manipulated by populist politicians into a quasi-solidarity. The solidarity of conscience and the solidarity

25 J. Tischner, *W krainie schorowanej wyobraźni*, Kraków 1998, p. 86.

of reason were replaced by the solidarity of a crowd looking for a scapegoat. What remains of the old ideals is a negative bond, linked to the division into "Us versus Them." A common enemy unites, but this is a tactical solidarity, something like a military alliance. The problem with alliances is that they are always adapted to current needs and defined by leaders. In the case of negative solidarity, when the external threat disappears, an enemy is still needed. Subsequently, it is sought even from within our own ranks. There is always an enemy "on duty": traditionally, the Jews, Freemasons, all the "Others" (most recently migrants) — in essence, all those who differ from the stereotype of "true" representatives of the community.

A grain of optimism for the future

The Church, which substantially contributed to the formation of the Solidarity movement and the formulation of its ethos, unfortunately also played a significant role in the process of destroying this very ethos. Its support offered to one political side triumphalism and hubris, which then led to the desolidarisation of society and a departure from the evangelical ideals on which John Paul II and Józef Tischner tried to base the Solidarity movement.

However, the Church can still play a great role in the restoration of Solidarity's ideals. Not by stigmatising non-Christians or atheists. Not by calling for unity from the pulpit. Instead, it can look to initiating joint action in local communities. Solidarity can be recaptured again by rallying people around specific common initiatives that will realise the common good.

In small communities, such as parishes, it is possible to pursue common goals while taking into account different tastes or views. Every action here has a tangible outcome, every mistake translates into real suffering, and every goal achieved together is a shared reason to be proud and say *we* did it. By acting together, mutual trust and solidarity can be rekindled, thereby enabling each citizen to feel empowered and responsible for our common fate. This is the place for rebuilding the solidarity of reason which Anton Rauscher wrote about: "Solidarity rather means that everyone, strong and weak, must pull together, because everyone depends on one another."[26] We become increasingly

26 A. Rauscher, *Źródła idei solidarności*, [in:] *Idea Solidarności dzisiaj*, ed. W. Zuziak, Kraków 2011, pp. 26–27.

aware that we are "condemned" to solidarity, that neither the strong alone nor the weak alone are able to stop the progressive degradation of the societies and natural environment entrusted to us. We are not independent and self-sufficient islands that can isolate themselves from the rest of the world, neither individually nor socially. The short-sightedness of the selfish concept of neoliberalism is already apparent. The poor are getting poorer and nature is degenerating. So, what good is it for the rich to become increasingly richer when soon they will have nowhere to hide from those they have wronged and will have no air to breathe to sustain their lifestyles?

Perhaps the community of conscience will soon become an economic challenge and a duty for the richer part of the world. Perhaps, without this community the wealthier fraction will not be able to survive and certainly will not be able to comfortably consume the wealth it has accumulated. Perhaps this historical necessity will lead to a synthesis of ethical and economic values. The rich will realise that, for their own good, it is worth listening to the cry of those who suffer and responding wisely to that cry. They will realise that the accumulation of wealth alone does not bring happiness, peace, or security, and that it is therefore necessary to reach out to the weak and help them bear their burdens. Perhaps the rich will also notice that the poor possess a number of values (long — forgotten by the rich) which can make their own existence fuller and better.

Let us repeat: the continued existence of solidarity requires the shared responsibility of all those institutions that make up the community, as well as of all citizens, and the inclusion of all members of society in the pursuit of the good of the whole. Solidarity also calls for courageous, imaginative, and charismatic leaders who will break down divisions and unite communities, both in the dimension of small communities and nations, as well as in the global, transnational, and intercultural dimensions.

Abstract

The rise of philosophy of Solidarity in Poland

The article presents the historical events that were crucial to the emergence of the "Solidarity" movement. Against the background of the evolution of demands made by Polish workers, the article discusses the impact of the Polish Catholic intelligentsia on these events. It also points to the sources of Biblical inspirations which, thanks to the influence of Karol Wojtyła and Józef Tischner, appeared in the formation of the ethos of solidarity. Next, it outlines the development of the moral philosophy of solidarity in the initial period of the movement's formation and discusses the reasons for the subsequent departure from the ethos of solidarity from this perspective. The conclusion shows both the shortcomings of contemporary models of solidarity and the prospects for the development of the project of solidarity in a universal dimension.

Keywords: authenticity, common good, ethos, conscience, solidarity, participation, community

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From a social issue to an ecological issue. A glance at the ongoing transformation of the energy model in Europe from a sociological perspective

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A social issue is a bundle of social problems — co-occurring, interlinked problems that cannot be solved individually, but only systemically, through a fundamental reformulation of state policies.[1] In the language of programming public actions, this is "a matter to be dealt with of significant political importance."[2] Such a social issue was the workers' issue that appeared in Europe in the second half of the 19th century. The issue was triggered by a technological and organisational change in the production system, referred to as the Industrial Revolution: manufactories where production was based on manual labour were replaced by factories where production was carried out using steam engines.[3] An important fact, especially when viewed from today's perspective, is that the energy used by steam machines was mainly generated by burning coal. Thus, the revolution in the technology of mass production of material goods, initiated in European industrial centres, set in motion

1 M. Rymsza, *Polityka społeczna wobec kwestii społecznej w XXI wieku*, [in:] *Kwestia społeczna u progu XXI wieku*, eds. E. Giermanowska, M. Racław, M. Rymsza, Warszawa 2015, p. 31.

2 B. Rysz-Kowalczyk, *Teoria kwestii i problemów społecznych*, [in:] *Polityka społeczna*, eds. G. Firlit-Fesnak, J. Męcina, Warszawa 2018, p. 161.

3 See: R. Mishra, *Society and Social Policy. Theories and Practice of Welfare*, London 1982, pp. 39-49.

systemic changes in two fields: (1) the organisation of the labour market and (2) the exploitation of fossil fuels.

Key in the first field proved to be the displacement in industrial centres of hired labour requiring craft skills by simple labour used in machine production. Steam engines made it possible to produce more, faster and at lower cost. In particular, the cost of hired labour was reduced, as labour to operate the machines did not require qualifications, and the urbanisation process accompanying industrialisation ensured a permanent surplus of unskilled labour in the labour markets of the industrial centres.

The negative side effects in the second field remained unrecognised for a long time and were therefore practically absent from the debate on possible ways to solve the workers' question. Harmful to health and a nuisance in daily life, smog in the 19th-century industrial centres where coal was mined and burned did not become an important component of the social issue of the time. Meanwhile, pollution and environmental contamination increased with the growing scale of industrial production and energy consumption. At the same time, steam engines began to be used not only in industrial production but also in the process of coal extraction, and coal itself was also used for heating homes. When the growing extraction of coal (hard coal and lignite) began to be accompanied by the massive extraction and consumption of oil and its derivatives as a liquid energy resource, it was already possible to speak of a comprehensive strategy of industrial development on a global scale based on fossil fuel energy. The negative environmental and human health effects of fossil fuel extraction and consumption were only recognised as a global social problem at the end of the 20th century. This problem has become an important component of the 21st-century environmental issue.[4]

The workers' question, which attempts to address a century earlier, gave rise to the modern social policies of developed countries, but did not include ecological aspects. At the centre of the debate on the negative social effects of the 19th-century industrial revolution were the working conditions and living standards of hired workers and their families. It was recognised that the drastically low wages of unskilled workers, allowing only for the reproduction of the ability to provide work but no longer enabling the worker to support the family, led to the mass employment of women and children in the factories.

4 M. Popkiewicz, *Rewolucja energetyczna. Ale po co?*, Katowice 21015, pp. 14-46.

Employers, in accordance with the laissez-faire ideology,[5] that had prevailed since the first half of the 19th century, had no obligations towards the workers they employed other than the payment of wages; labour was simply a commodity purchased by them on the free market in a situation where there was a significant surplus of labour supply over labour demand. There were no norms governing labour relations; workers were not only not allowed to go on strike, but also not allowed to unionise or bargain collectively with their employers.

Two alternative approaches to solving the workers' question have emerged in Europe: (i) revolutionary and (ii) evolutionary. Those in favour of the revolutionary path first turned against steam engines as a source of workers' misery. When it became clear that it was impossible to deviate from the path of technological development, as the new technologies brought a number of obvious advantages in addition to problems, private employers were seen as the source of the exploitation of the working masses. The solution, therefore, was to abolish private ownership of the means of production by means of a systemic revolution. The defeat of the revolutionary strategy in Western Europe led to a withering of the appeal of Marxist ideology, which was unable to develop a coherent position towards the emerging welfare states that, by providing social security for working people, weakened the carrying capacity of the revolutionary strategy.[6]

The evolutionary approach pointed to the need to civilise industrial relations by regulating the functioning of the wage labour market and launching social protection programmes for workers losing their earning capacity. Criticism of early industrial relations was conducted in three aspects: (i) ethical, (ii) in terms of the dysfunctionality of the organisation of collective order and (iii) on macroeconomic grounds. Reform efforts resulted in the creation of two systemic solutions: collective labour relations and employee social security. It was these two systemic solutions that became the foundations of the welfare state.[7]

An important voice in the ethical and functional critique of early industrial relations was that of the Catholic Church, particularly the encyclical *Rerum*

5 See: D. Fraser, *The Evolution of the British Welfare State*, London 1984, pp. 99-123.

6 See: V. George., P. Wilding, *Welfare and Ideology*, New York 1994, pp. 102-129.

7 P. Flora, J. Alber, *Modernizatrion, Democratiozation, and Development of Welfare States in Western Europe*, [in:] *The Development of Welfare States in Europe and America*, eds. P. Flora, A. Heidenheimer, New Brunswick. 1981, pp. 37-80, especially the Figure 2.2, p. 42.

Novarum.[8] In it, Pope Leo XIII spoke out against the revolutionary strategy and the abolition of private property, but at the same time pointed to the tasks of the state as an intermediate employer in solving the workers' question, including the need to realise the concept of a just wage as an income enabling the wage-earner to support his family and the need for dialogue between employers and workers, using the potential for self-organisation of working people.

In turn, in economist circles, the dysfunctionality of an economic model based on a combination of low wages and mass production, where the supply of manufactured goods significantly exceeds domestic market demand, was pointed out. This trend of reflection led to the creation of the Keynesian school of economics, which appreciates the intervention of the state in the play of market forces by stimulating demand and consumption, including controlling the purchasing power of wage earners.[9]

It is not the place here to discuss the successive stages in the development of European social policy after the Industrial Revolution, nor to characterise the components of modern welfare states as the final 'products' of policies to address the 19th-century social question.[10] For the reflections carried out here, it is crucial to highlight the evolutionary nature of the systemic reforms carried out and to agree on the perspectives: ethical, functional, and economic in constructing the foundations of European welfare states. This, in turn, resulted in a decades-long political consensus in Europe around the basic assumptions of the concept of welfare states.[11]

The main postulate of this article is that the contemporary ecological issue should be addressed in an evolutionary way, with a reconciliation of ethical, economic and functional perspectives, and by building a political consensus that is as sustainable as possible. The juxtaposition of evolutionary and revolutionary strategies is not particularly resonant today — three decades after the collapse of communism in Europe. But let us note that leaving communism as a systemic change brought about a similar (though not as sharp) list of alternative approaches to programming systemic change as at the turn of

8 Leo XIII, *Rerum Novarum. Encyclical of Pope Leo XIII on Capital and Labor,* https://www.vatican.va/content/leo-xiii/en/encyclicals/documents/hf_l-xiii_enc_15051891_rerum-novarum.html

9 J. W. Nevile, *Keynesianism*, [in:] *International Encyclopedia of Social Policy*, eds. T. Fitzpatrick et al., London 2010, pp. 720-722.

10 See: M. Bruce, *The Coming of the Welfare State*, London 1968; D. Fraser, *The Evolution of the British Welfare State.*

11 M. Sullivan, *The Politics of Social Policy*, New York 1992; T. H. Marshall, *Social Policy*, London 1975.

the 19th and 20th centuries. They are referred to in the literature as transition (an approach closer to the revolutionary strategy) and transformation (an approach closer to the evolutionary strategy).

The Polish experience of political change should be taken into account when programming the change of the national energy model. It is worth bearing in mind that the adoption of the transformation path, both in Poland and on a European scale, will allow for maintaining continuity between the policy of solving the 19th-century social issue and the policy of solving the contemporary ecological issue.[12]

Transformation and transition as two approaches to the process of systemic change

Transition is a systemic change understood as a transition from system A to system B, i.e. a change involving the introduction in a given country of legal and institutional solutions characteristic of system B in place of the solutions functioning before the change under system A. Transformation is a systemic change understood as the transformation of solutions functioning in a given country under system A into solutions that meet the criteria applicable in system B.[13] A real systemic change — for example, of the political system of a particular country or the model of energy production and consumption — is usually a political, socio-economic process, which includes elements of both transition and transformation. Transition and transformation are model approaches to systemic change, i.e. ideal types as understood by Max Weber.[14]

The ideal type, as Weber emphasized, is created by the researcher simultaneously enhancing the features considered crucial for the analysed phenomenon or process and marginalising those features that seem unimportant. For Weber, the ideal type is an analytical tool. In order to better understand the essence of the studied phenomenon (or process), it is worth comparing it with the ideal type as a pure type, whose key elements and the relationships between them are clearly visible (purified, as it were), and thus understandable.

12 J. Auleytner, *Polityka społeczna, czyli ujarzmianie chaosu socjalnego*, Warszawa 2002, p. 62.

13 K. Gadowska, M. Rymsza, *Od socjologii transformacji do socjologii sfery publicznej. Nowe możliwości syntezy wiedzy o zmianie systemowej*, „Studia Socjologiczne" 2017, no 4, pp. 19-23.

14 M. Weber, *Obiektywność poznania w naukach społecznych*, przeł. M. Skwieciński, [in:] *Problemy socjologii wiedzy*, eds. A. Chmielewski et al., Warszawa 1985, pp. 80-93.

However, Weber pointed out that in an analogous way (but for a different purpose), it is possible to construct normative models as not tools for scientific analysis, but patterns for designing practical solutions.[15] The difference here is that in the model types, the features that are not so much characteristic as desired are emphasised and intensified. For Weber, the construction of model types was no longer an academic pursuit, but a social practice. Nevertheless, it is worth emphasising that the procedures for constructing ideal types as analytical tools and normative models are similar; what is an objective characteristic for one specialist may turn out to be a desirable feature for another.

The programming of public action is a sphere of social practice. A practice entrusted not only to decision-makers-practitioners, i.e. politicians (decision-makers elected by citizens and controlled by public opinion) and public servants (decision-makers from the apolitical civil service corps), but also, to a large extent, to experts with scientific analytical and research skills.[16] As a result, within the framework of analysing and programming public action, ideal types and normative models are often mixed: value judgements from the world of social practice are transferred to scientific analysis, and practical solutions are formulated according to the assumptions of certain ideal types. Practices of the first type can be described as the ideologisation of scientific analysis, and practices of the second type are examples of theoretical doctrinairism.

The situation is further complicated by the fact that group interests play an important role in public decision-making processes,[17] which stakeholders seek to legitimise, among other things, by invoking the corresponding ideal types. Moreover, by using certain elements of ideal types, specific vested interests can be legitimised (intentionally or unintentionally). In other words, specific models, paradigms, approaches, concepts — both analytical (ideal types) and design-related (normative models) — usually turn out to be more than just analytical-design tools. It is quite obvious that in order to achieve a certain goal in the construction of public policies, we try to select the right tools. It is less obvious, however, that the tools used, both at the stage of programming and implementation, always reformat the aims of these policies

15 M. Weber, *Obiektywność poznania w naukach społecznych*, p. 87.

16 A. Zybała, *Polityki publiczne. Doświadczenia w tworzeniu i wykonywaniu programów publicznych w Polsce i w innych krajach*, Warszawa 2012, pp. 293-322.

17 See: D. Milczarek-Andrzejewska, P. Tłaczała, *Analiza grup interesu*, [in:] *Teoria wyboru publicznego. Główne nurty i zastosowania*, ed. J. Wilkin, Warszawa 2012, pp. 196-220.

to some extent. In other words, the relationship between the aims and tools of public policies is two-way, not one-way.

This interdependence is worth bearing in mind when juxtaposing two approaches to systemic change: change understood as a transition from system A to system B, and change understood as the transformation of system A into system B. It is important to be aware of how the two approaches differ and how each approach translates into social practice: not only in understanding the systemic change processes taking place but also in actively profiling them. We will consider this using the example of the systemic change implemented in Poland in the 1990s (cf. Table 1).

Firstly, the change of the state system, both in the paradigm of transition and in the paradigm of transformation, is a process spread over time. This process is not only concerned with making formal and legal changes (although it is necessary to have time to prepare these as well), but also with changes at the level of the functioning of the institutions of the public sphere, bureaucratic pragmatics, behaviour of collective actors, etc. We note, however, that the **transformation paradigm** is characterised by greater decision-making 'patience' in this aspect, while in the **transition model** there is a tendency to accelerate changes, to apply — as in the case of the marketisation of the Polish economy — reforms of a 'shock therapy' nature.[18]

Secondly, the **transition paradigm** exposes the exogenous (external) conditions of systemic change. In this perspective, communism collapsed as a macro-system on an international scale: the Berlin Wall fell, the Soviet Union collapsed and the countries of Central and Eastern Europe were given the opportunity to make systemic change, understood as the introduction at home of systemic solutions applied in Western European countries. Here, systemic change is treated as an adaptation of countries from a specific region to changes associated with globalisation and remains in line with the strong market and soft-state model outlined in the 1990s by the World Bank.[19] In contrast, the **transformation model** exposes endogenous (internal) conditions. It was we, the Polish society, who rejected communism: first through mass participation in the Solidarity movement, which in 1980-1981

18 See: S. Gomułka i T. Kowalik (wybór), *Transformacja polska. Dokumenty i analizy 1990*, Warszawa 2011.

19 *From Plan to Market. World Development Report 1996,* World Bank, New York 1996; *The State in a Changing World. World Development Report 1997*, World Bank, Washington DC 1997.

disturbed the systemic foundations of the People's Republic of Poland,[20] and then by delegitimising the communist authorities in the plebiscite parliamentary elections of 4 June 1989[21] (the Berlin Wall, it is worth remembering, was dismantled five months later.) The Round Table talks as an agreement of the national elites also fit into the logic of transformation.[22] On the other hand, in the model of transition, the so-called Washington Consensus, encompassing agreements on the scope and form of support for the systemic change in Poland and other countries of Central and Eastern Europe by supranational institutions such as the International Monetary Fund and the World Bank, turns out to be important.[23]

Thirdly, in the **transition model**, modernisation has the character of a largely imitative development, involving the adoption of solutions founded in advanced welfare states, with elements of adaptation to local circumstances.[24] It is the developed countries that share their economic know-how in exchange for more or less privileged access to new markets; it is they who define what political democracy and civil society are (and are not.) The assistance provided to countries in transition is significant on their part, but the lack of partnership is also significant.[25] In the critical current, such aid and development practices are even referred to as the neo-colonial approach.[26] In the **transformation model**, the state in the process of systemic change also benefits from external support, but it relies more on domestic resources and its own know-how in the reforms carried out, both the 'old' know-how (which is not completely discarded) and the know-how accumulated from the transformation experience.[27] An example of the application of the transition approach in a way that is close to the pure transition model can be found in Estonia, and in a way that is close to the pure transformation model in Slovenia.

20 J. Holzer, *Solidarność 1980-1981. Geneza i historia*, Paryż 1984.

21 A. Dudek, *Historia polityczna Polski 1989-2012*, Karków 2013, pp. 33-46.

22 A. Dudek, *Historia polityczna Polski*, pp. 19-33.

23 See: Z. Ferge, *Welfare and 'ill-fare' systems in Central-Eastern Europe*, [in:] *Globalization and European Welfare States*, eds. R. Sykes et al., Basingstoke 2001.

24 A. Lubbe, *Transformacja, modernizacja, czy po prostu normalizacja? Wybory modelu gospodarki polskiej po 1989 roku*, [in:] *Modernizacja Polski. Struktury. Agencje. Instytucje*, ed. W. Morawski, Warszawa 2010, pp. 62-64.

25 W. Kieżun, *Patologia transformacji*, Warszawa 2013.

26 See: K. Górniak, *Społeczeństwo obywatelskie w Polsce – spojrzenie postkolonialne*, „Trzeci Sektor" 2014, no. 1 (32), pp. 17-29.

27 M. Rymsza, *Aktywizacja w polityce społecznej. W stronę rekonstrukcji europejskich "welfare states"?*, Warszawa 2013, pp. 205-220.

Fourthly, the political costs of systemic change carried out in the rapid **transition formula** are significantly lower than the political costs of systemic change in the logic of a protracted **transformation**;[28] while, counted in total, the social costs of shock therapy applied in the **transition model** turn out to be significantly higher.[29] "Step-by-step" reforms, implemented as part of the strategy of systemic change, where the starting point is known (rejection of communism), but the target solutions emerge in the course of the reforms, being, as it were, the culmination of the transformations carried out,[30] allow these costs to be significantly reduced.

Table 1. System change in the transition model and in the transformation model

Differentiation criteria	Transition paradigm	Transformation paradigm
Determinants of systemic change	crucial importance of external factors	key self-effort and responsibility
Course of change	as rapid as possible — shock therapies	spread over time — step-by-step reforms
Costs of reforms	political — limited, social — high	political — high, social — limited
Development factors	resources and know-how mainly external	external support using own resources
Development strategy	Diffusion-polarisation strategy: investments concentrated in major centres as development locomotives	more territorially balanced development, using own dispersed resources
Limits to modernisation	traps of dependent (imitative) development	influence of the forces defending the old status quo

Source: Own analysis.

Fifthly, the **transition model** is dominated by a diffusion-polarisation development strategy, where the carriers of change are the so-called growth centres (primarily the largest urban agglomerations)[31] as recipients of

28 See: L. Balcerowicz, *Wolność i rozwój*, Kraków 1995, pp. 317-374.

29 G. W. Kołodko, *Transformacja polskiej gospodarki. Sukces czy porażka?*, Warszawa 1992; P. Sztompka, *Trauma wielkiej zmiany. Społeczne koszty transformacji*, Warszawa 2000.

30 See: M. Rymsza, *Urynkowienie państwa czy uspołecznienie rynku? Kwestia socjalna w Trzeciej Rzeczypospolitej na przykładzie ubezpieczeń społecznych*, Warszawa 1998, pp. 99-102.

31 *Polska 2030. Trzecia Fala Nowoczesności. Długookresowa Strategia Rozwoju Kraju*, Ministerstwo Administracji i Cyfryzacji, Warszawa 2013.

transferred know-how and areas of cumulative investment. In the **transformation model**, development is more territorially balanced, as it makes greater use of dispersed own resources.[32]

Sixthly, in the **transition model**, development constraints are related to the dependent development trap: the recipient country does not receive the latest know-how in order not to become a competitor to the countries supporting it in the modernisation proces.[33] In the **transformation model**, on the other hand, the inhibiting factors are the forces and defence mechanisms of the old status quo.[34]

The differences between the systemic change understood as a transition and the systemic change understood as a transformation, presented in Table 1 and briefly characterised, are not an exhaustive discussion of the essential assumptions of each of the models (as ideal type and normative model at the same time) and the differences between them. They are, however, sufficient to capture the game of macro-interests that accompanies a regime change – from totalitarian communism (as the aforementioned system A), where the public sphere is totally controlled by the state, the economy is centrally controlled, and there is no space for social self-organisation, to liberal democracy (as system B), which is characterised by the triad: political democracy, free market economy, and civil society.

To put it briefly, in the transition model: (1) systemic change occurs faster, (2) the actor in the process of change receives a lot of external support, but (3) on terms favourable to the supporting actors; thus, (4) the implementation of systemic change does not make the supported actor an equal partner, because in the logic of imitative development adopted here as dependent development, the modernised country remains "two steps" behind the developed countries. In contrast, in the transformation model: (1) systemic change proceeds more slowly, (2) reforms are much more strongly exposed to the defensive mechanisms of the old order, but at the same time (3) although external support

32 See: A. Sen, *Development as Freedom*, New York 1999; A. Matysiak, M. Raftowicz-Filipkiewicz, *Wpływ procesów endogenicznych na rozwój zrównoważony*, „Studia Ekonomiczne. Zeszyty Naukowe Uniwersytetu Ekonomicznego w Katowicach" 2017, no. 311.

33 See: *Autostrady i bezdroża polskiej modernizacji* (Editorial discussion between A. Giza-Poleszczuk, P. Koryś, A. Leszczyński and Z. Nosowski, M. Rymsza), „Więź" 2013, no. 2 (652), pp. 39-53.

34 L. Balcerowicz, *Wolność i rozwój*.

is used, it is easier here not to remain in the logic of dependent modernisation and thus (4) gradually develop one's own pro-development know-how.

As Zsuza Ferge argues,[35] in the reflections of Western analysts the systemic change taking place at the turn of the century in the countries of Central and Eastern Europe (including Poland) appeared to be a change of a transitional nature.[36] It is equally understandable that Polish experts developed a transformational paradigm.[37] The theory of transformation is an important, though not fully explored, contribution of contemporary Polish sociologists and political scientists to the development of applied social sciences.[38]

It is worth noting that in the reflections of Western academics, under the influence of empirical data on the fate of systemic reforms in Central and Eastern Europe, the "edge" of the transition formula has become blunted. There has been a growing awareness of the high social costs of shock therapy for national economies and the need to include an 'intermediate stage' in the transition from communism to democracy, referred to as the post-communist model; and the gradual transition, as so understood, came closer to the transformation formula.[39] The questioning of the shock therapy model by its co-creator Jeffrey Sachs[40] echoed loudly. Also significant was the appreciation of the role of the state and the public sector vis-à-vis the play of market forces by Joseph Stiglitz, Nobel laureate and one of the most globally influential US economists, following the end of his work with the World Bank,[41] ultimately followed by a change in the Bank's own policy in supporting the development of countries in transition by valuing the role of endogenous development

35 Z. Ferge, *Welfare and 'ill-fare' systems in Central-Eastern Europe*.

36 See: T. Fizpatrick, *Transitional Economies*, [in:] *International Encyclopedia of Social Policy*, op. cit., pp. 1419-1421; *Welfare States in Transition. National Adaptations in Global Economies*, ed. G. Esping-Andersen, London 1996; *Societies in Transition: East-Central Europe Today*, eds. S. Ringen, C. Wallace, Aldershot 1994.

37 See: E. Wnuk-Lipiński, *Rozpad połowiczny. Szkice z socjologii transformacji ustrojowej*, Warszawa 1991; J. Staniszkis, *W poszukiwaniu paradygmatu transformacji*, Warszawa 1994; A. Sułek, J. Styk, I. Machaj (wybór i opracowanie), *Ludzie i instytucje. Stawanie się ładu społecznego*, vol. 1, Lublin 1995; I. Krzemiński, J. Raciborski, *Oswajanie wielkiej zmiany. Instytut Socjologii UW o polskiej transformacji*, Warszawa 2007; J. Kurczewski, *Ścieżki emancypacji. Osobista teoria transformacji ustrojowej w Polsce*, Warszawa 2009.

38 K. Gadowska, M. Rymsza, *Od socjologii transformacji do socjologii sfery publicznej,* p. 27.

39 See: R. Mishra, *Globalization and the decline of 'social protection by other means': the transformation of welfare regimes in Australia, Japan, and Eastern Europe*, [in:] *A Handbook of Comparative Social Policy*, ed. P. Kennett, Cheltenham 2013, pp. 57-60.

40 J. Sachs, *The End of Poverty. How We Can Make it Happen in Our Lifetime,* London 2005.

41 See: J. E. Stiglitz, *Economics of the Public Sector*, New York & London 2000, and especially Preface, pp. xix-xxiii. Author was the chief economist of the World Bank during the years 1997-2000.

factors over the implementation of external solutions. There was also a growing awareness of the diversity of social security systems and, more broadly, of institutional patterns of social policy making in the CEE group of countries, which undermined the sense of applying the same Western solutions.[42]

In the post-transformation period, i.e. after Poland's accession to the European Union in 2004, we were unable to bring out the strengths of the transformation logic. This is because, on political grounds, in a situation of social fatigue with systemic change, the aspiration prevailed in Poland for accelerated and, at the same time, relatively easy-to-manage modernisation associated with dependent development, relying to a large extent on the efficient absorption of external resources in the form of EU structural funds.[43] The academic community has largely succumbed to the pressure of modernization formatted in this way and the (temporary) infatuation with neoliberalism.[44] The need to reorient the country's development towards endogenous development tracks was only strongly hinted at in the 2017 *Strategy for Responsible Development*,[45] which accounted for its attractiveness.[46] Unfortunately, the strategy was not consistently implemented.

This makes it all the more important to realise the difference between the logic of transformation and the logic of transition when programming change in the energy model. Unfortunately, in the aforementioned *Strategy for Responsible Development* itself, relatively little and rather conservatively[47] was written about changing the energy model. One might even get the impression that the team preparing this strategic document failed to subject the game of interests present in the energy industry to the logic of horizontal programming. This is evidenced by the treatment of changes in the area of energy and environmental protection[48] as if they were two separate, mutually unrelated fields of public activity. Meanwhile, it is the environmental protection policy that will have a significant impact on the energy industry, and the paradigm

42 T. Inglot, *Welfare States in East central Europe 1919-2004*, Cambridge 2008; M. Polakowski, *The Institutional Transformation of Social Policy in East Central Europe. Poland and Hungary in Comparative and Historical Perspective*, Mastricht 2010.

43 A. Sadowski, *Kto zapłaci za ten rachunek?*, "Więź" 2013, no. 2 (652), pp. 61-63.

44 K. Gadowska, M. Rymsza, *Od socjologii transformacji do socjologii sfery publicznej*, p. 28.

45 *Strategy for Responsible Development for the Period up to 2020 (Including the Perspective up to 2030)*, Ministry of Development, Warsaw 2017.

46 See: *Opinia o projekcie Strategii na rzecz Odpowiedzialnego Rozwoju*, Narodowa Rada Rozwoju, Kancelaria Prezydenta RP, Warszawa 2016, pp. 5-54.

47 *Strategy for Responsible Development,* pp. 251-258.

48 *Strategy for Responsible Development*, pp. 259-270.

of changing the energy model implemented in the coming years will largely determine the development trajectory of our state and national economies.

What transformation of the energy system?

The systemic change in the production and use of energy is currently defined in the European discourse in terms of energy system transformation. Three objectives of the EU energy and climate policy to be achieved by 2030[49] have been defined as follows: (1) to reduce greenhouse gas (GHG) emissions by at least 40% (compared to 1990 levels); (2) to increase the share of energy obtained from renewable energy sources (RES) to at least 32% (in total energy consumption); (3) to increase the so-called energy efficiency by at least 32.5%. Framing the programmed systemic change in terms of the transformation of national energy models is beneficial for the Member States and their citizens, in particular for those countries and societies where the projected changes will be the most far-reaching. This group of countries unquestionably includes Poland, whose so-called energy mix is currently based on the predominance of energy obtained from coal combustion. At the same time, the achievement of such ambitious reduction and efficiency targets over a period of just one decade[50] is conducive to formatting operational activities in a manner closer to the transition model.

In July 2021 the European Commission made the next step in shaping European Green Deal announcing the Revision of the Renewable Energy Directive. The aim of the package of legislative proposals called *Fit for 55*[51] is to significantly accelerate the green transformation in the European continent. The new proposals assume to increase in 2030 in all UE member states the share of RES in the energy mix up to 40%, and — first of all — to reduce in 2030 of net GGE emissions (also in all member states) by at least 55%, compared to

49 The framework of EU policy in that field was shaped by the European Commision in 2014 in the document *A policy framework for climate and Energy in the period from 2020 to 2030*, European Commission, Brussels 2014, COM(2014) 15 final. The document was updated in 2018 when indicators of reaching strategic goals were raised. Poland as the only EU member state did not sign this document.

50 Ten years in strategic programming is a relatively short period.

51 *Fit for 55 Package. Briefing towards climate neutrality,* https://www.europarl.europa.eu/RegData/etudes/BRIE/2022/733513/EPRS_BRI(2022)733513_EN.pdf

1990 level. *Fit for 55* undoubtedly promote green revolution based on transition paradigm although still using 'transformation' as a crucial term.

In this situation, it seems crucial for organising public debate and expert discourse to bring out the rational aspects of the transformation model, emphasising the benefits of its real implementation. From this perspective, it would be a mistake to use transformational rhetoric in the discourse with supporters of an accelerated energy transition as an argument for simply slowing down the pace and scale of the changes introduced. Transformation is a model of real systemic change, not a strategy for delaying reform or making sham changes. Only it is distinguished by its ability to carry out systemic change by an evolutionary method, while minimising social costs and maximising social benefits. The time to implement changes here is a function of accumulating benefits, not vice versa. The benefits are thus not linked to the postponement of change, but to the way in which it is carried out, involving the mobilisation of one's own resources and endogenous development potential. And it is the bringing out in the discourse of such possible benefits from the implementation of the transformative paradigm of systemic change that seems crucial. Given the above, it is worth noting the following circumstances and determinants of energy paradigm change.

- **The strategy of pushing for rapid changes in European national energy systems as changes from which there is no turning back is reminiscent of the shock therapies of the economies of countries emerging from communism in the 1990s**. It is worth pointing out at this point that market reforms were introduced in the absence of clarity about the political scenario unfolding on our continent. It was then assumed that the time of political détente should be used as effectively as possible and market mechanisms should be introduced to centrally planned economies in such a way as to trigger a scenario of self-propelling changes, which can no longer be stopped by possible counter-political decisions. This was one of the justifications for the reformist rush. However, in the case of changing the energy model in conditions of political democracy, there is no risk of a political reversal of the proposed reforms: climate change is becoming more and more obvious — because it is directly felt — for an increasing number of people. The pressure of time is thus associated not with the possibility of reverse policies, but with the mass perception of climate change, the accompanying collective emotions, and the

possibility of starting (initiating) the process of irreversible climate change leading to an ecological catastrophe on a global scale.

I do not have the knowledge to comment on the pace, 'depth' and permanence of the observed climate change. This knowledge is, of course, an indispensable component of the instrumentation for rational programming of public activities, currently referred to as conducting energy and climate policy. Nevertheless, the programming of public actions should also take into account sociological knowledge, including the phenomenon of moral panic recognised in the social sciences and its impact not only on public sentiment and social order but also on public decision-making processes. Moral panic may manifest itself spontaneously from below, but its maintenance is also one of the ways to legitimise planned public activities.[52] Moral panic is a mass fear of some phenomenon, process, or state, which legitimises taking almost immediate remedial action. There is not only a social 'directional' consent to take action but also a highly risky 'leap' to accept a specific programme of action. In a situation of moral panic, a solution that can be implemented here and now becomes the necessary solution that has no alternative. Meanwhile, it is the belief that there are no alternatives that lowers the rationality of public policy programming; it leads to underestimating the social costs of the systemic change being carried out and leads to underestimating the importance of side effects and unintended and unanticipated consequences.[53] Therefore, considering alternative solutions or different strategies is one of the key elements of the rational programming of public actions.[54]

► **Moral panic not only increases the risk of multiplying the social costs of the systemic change being carried out, but also promotes the pushing forward of the interests of the most powerful and best-organised interest groups**. Sociological analysis here refers to Merton's category of manifested and latent (overt and covert) functions of public programmes.[55] The rapid implementation of increased production standards for car engines may serve not only the protection of the environment (explicit aim – overt function) but also the interests of the strongest producers in the global market, able to adapt to increased norms and standards faster than the competition (implicit aim – covert function). In turn, significant subsidies from

52 See: K. Thompson, *Moral Panics*, London 1998, pp. 36-39.
53 J. Elster, *Nuts and Bolts for the Social Sciences*, Cambridge 1992, pp. 91-100.
54 A. Zybała, *Polityki publiczne*, p. 82.
55 R. K. Merton, *Social Theory and Social Structure*, New York 1968, pp. 92-157.

public funds for the purchase of very expensive (and thus inaccessible to average citizens) cars with electric engines not only shape pro-environmental consumption patterns (manifested function) but also lead to a redistribution of income "from the poor to the rich" within the national community (latent function). And if we add to this the attempts to intervene by raising oil and petrol prices above their market value, we have — as in France — a possible scenario for the launching of protests like the Yellow Vests movement, which, although undertaken by representatives of the middle class, can take radical forms and escape the control of public services. Examples of the play of overt and covert interests and their unexpected outcomes can be multiplied.

► **Ethical reflection is a necessary element in the programming of public actions**. Indeed, any state intervention in collective life requires axio-normative justification. When new social problems or issues emerge, ethical reflection should lead to a questioning of the status quo and thus legitimise the intervention under preparation. However, when social consent for action is already in place (which can be assumed to be the case with the directional guidelines of the European Union's new energy and climate policy),[56] ethical reflection should be extended to the assessment of the proposed and implemented measures themselves. Indeed, ethics should not be an instrument for sustaining moral panic but, on the contrary, lead to responsible decisions: morally right and at the same time reasonable (justified.)[57] Let us recall that the distinguishing feature of the policy of the evolutionary solution to the workers' issue in Europe was the agreement on ethical, functional, and economic perspectives. The strength of the aforementioned encyclical Rerum Novarum of Pope Leo XIII was the combination of ethical reflection with a common-sense approach. It seems that a similar potential lies in the encyclical Laudato Si' of Pope Francis.[58] This encyclical combines (1) moral reflection on the proper use by humans of the goods of nature, (2) suggestive illustrations of a growing ecological crisis involving the loss of biodiversity, overexploitation of natural resources, increasing restrictions on access to water, etc., and (3) demands for remedial public action at local, national and international levels. A discussion of Pope Francis' reflections and proposals is the subject of a separate paper. For the reflections carried out here, I would like to bring

56 Evidence of societal legitimization is rising number of green parties' members in the European Parliament, grass-root voluntary activities under ecological movements etc.

57 See: S. Cohen, *Folk Devils and Moral Panics. The Creation of the Mods and Rockets*, London 2002.

58 Francis, Encyclical letter *Laudato si'*.

out two themes: (i) concern for the poor[59] and (ii) criticism of the technocratic paradigm.[60]

► Pope Francis demands decisive and immediate pro-ecological actions, but at the same time emphasises the need to carry them out in a way that protects the interests of weaker communities and poorer societies. It is a continuation of the Christian "option for the poor" associated with the principle of the universal destination of goods[61] and recurring as a requirement of social justice throughout the Church's social teaching, starting with *Rerum Novarum*. On a global scale, the rich North must not burden the poorer South with the costs of climate policy, especially as it was the North that popularised the development concept based on the exploitation and use of fossil fuels on a global scale. Similarly (this is a further development of Francis' thoughts), on a European scale, the countries of the old EU-15 should not push for solutions that are too costly for countries that have just undergone a costly political transformation. Finally, at the level of national policy, it is necessary to think about linking the energy transformation with territorially sustainable development and to promote not only the development of RES as such but also prosumer forms of energy production and consumption. In Poland, it seems that high hopes can be pinned on photovoltaics and bioenergy.[62]

► **The ethical sensitivity directed by the encyclical Laudato si' furthermore dictates that the transformation of the energy model be carried out in a way that transcends the technocratic paradigm**. According to Pope Francis, it is not enough here to change the technology of energy production while leaving behind a development model based on the ever-increasing production and consumption of material goods. It is a question of reducing both production and consumption and spreading their new patterns, such as the closed-loop economy (sphere of production) and the sharing economy (sphere of consumption), valuing the non-material aspects of social well-being and taking greater care of social and family ties. In a word, integral ecology.[63] Appropriate planning and dissemination of activities in this area may, in the long-term perspective, bring greater social benefits than a purely technological leap in the field of new ways of obtaining energy.

59 Francis, Encyclical letter *Laudato si'*, 48-52.
60 Francis, Encyclical letter *Laudato si'*, 106-116.
61 *Kompendium Nauki Społecznej Kościoła*, Papieska Rada Iustitia et Pax, Kielce 2005, pp. 120-122.
62 M. Popkiewicz, *Rewolucja energetyczna*, pp. 268-290.
63 Francis, Encyclical letter *Laudato si'*, chapt. 4.

From a social issue to an ecological issue

Recognising the politics of solving the environmental question as a continuation of the politics of solving the 19th-century social question seems advisable for three reasons. First, it allows the energy and climate policy programming to draw on more than a century of evolutionary experience in shaping European social policies as policies for the rational and ethical creation of the foundations of social welfare.

Secondly, it allows the policy of building welfare states as states of societal well-being to be completed, as it were. After all, the origins of the 21st-century environmental question and the 19th-century social question are the same. Both are bundles of social problems emerging from the same development processes. It is just that the harmfulness and nuisance of some (working conditions and standards of living of industrial workers) were noticed earlier, and the harmfulness and nuisance of the other (impact of fossil fuel exploitation on the natural environment) — later. Both of them determine the quality of our lives.

Thirdly, consciously linking the resolution of an old social issue to the resolution of a new environmental issue provides an opportunity to overcome the dysfunctions and side effects of earlier modernisation efforts. Social development after the civilising of early industrial relations led through the formation of a social order referred to as an industrial society[64] to a modern society with very strongly developed patterns of consumerism[65] and technocratic rationality.[66] In contemporary late-modern societies as post-industrial societies, there is a growing awareness of the depletion of development potential based on these patterns; according to some researchers, a post-social situation is even being created.[67]

The concept of energy and climate policy linked to the integral ecology model allows for a systemic change that breaks through consumerism and

64 R. Mishra, *Society and Social Policy*, pp. 40-44.

65 B. R. Barber, *Consumed. How Markets Corrupt Children, Infantilize Adults, and Swallow Citizens Whole*, New York 2007.

66 T. Schwinn, *Nowoczesność: od historycznych źródeł do współczesnej ekspansji. Socjologia Maksa Webera w XXI wieku*, in: *Nowe perspektywy teorii socjologicznej*, eds. A. Manterys, J. Mucha, Kraków 2009.

67 See: A. Turaine, *After the Crisis*, Cambridge 2014.

managerial technocratism. In contrast, a purely technocratic orientation that enables the rapid change of the energy model itself to be pushed through is highly risky. Its real (measurable) impact on the climate remains essentially unknowable (and attempts to directly control the climate, e.g. weather, rainfall, etc., using the latest technologies are an example of self-referential politics of a downright moral gamble),[68] and the social costs incurred are very likely to prove very high. The concept of integral ecology opens the way to transformative changes, reforms that are less spectacular because they are spread out over time, but more comprehensive; changes with lower social costs and higher social benefits.

The key advantage of the transformational model is that the evolutionary introduction of interconnected new pro-ecological production and consumption patterns (including energy production and consumption) will be socially beneficial, regardless of how effective the systemic change is on climate impact.

Abstract

From a social issue to an ecological issue. A glance at the ongoing transformation of the energy model in Europe from a sociological perspective

The main message of this article is that contemporary environmental challenges should be addressed in an evolutionary way, taking into account ethical, economic, and functional aspects. At the same time, it is important to build a political consensus to include diverse perspectives. In the context of programming changes to the national energy model, it is worth taking into account the Polish experience of systemic change, which was achieved largely thanks to the Independent Self-Governing Trade Union "Solidarność." Adopting the transformation path, both in Poland and at the European level, will allow for maintaining continuity between the policy of solving the 19th-century social issue and the policy of solving the contemporary ecological issue.

Keywords: a social issue, an ecological issue, energy transformation, Europe, Poland, experience, political change

68 See: N. Luhmann, *Politische Theorie im Wohlfahrtsstaat*, München 1981.

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Solidarity in social insurance on the example of the Polish pension system

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The occurrence of social solidarity within the community of risk and the so-called social compensation resulting from it is included in the literature as a categorical feature of social insurance as a social security technique.[1] The community (group) of risk in social insurance is formed by social groups of persons performing gainful employment and thus exposed to the risk of loss of capacity to work as a result of random events of biotic nature, which by paying social insurance contributions jointly bear the costs of financing benefits for those members of this community who are affected by this risk. The solidarity-based sharing of the burden of covering the material consequences of certain random events between individuals is part of the essence of both social and economic insurance. In social insurance, social solidarity includes another dimension, which is not present in the case of economic insurance, namely the so-called social compensation.[2] In business insurance, the amount of the premium is differentiated according to the size of the individual risk.

1 K. Kolasiński, *Pojęcie i kryteria rozróżniania form zabezpieczenia społecznego*, „Praca i Zabezpieczenie Społeczne" 11 (1969) no. 5, p. 17; G. Wannagat, *Lehrbuch des Sozialversicherungsrecht,* Bd. 1, Tübingen 1965, p. 2; B. Schulin, *Techniken und Instrumente sozialer Sicherheit*, [in:] B. von Maydell, A. Nussberger, *Die Umgestaltung der Systeme sozialer Sicherheit in den Staaten Mittel- und Osteuropas*, Berlin 1993 (Der Schriftenreihe für Internationales und Vergleichendes Sozialrecht, 13), p. 178, M. Fuchs, *Zur Unterscheidung von Privatversicherung und Sozialversicherung*, "Vierteljahresschrift für Sozialrecht" 1991, p. 281.

2 G. Wannagat, *Lehrbuch des Sozialversicherungsrecht,* p. 2; B. Schulin, *Techniken und Instrumente sozialer Sicherheit...,* p. 178; M. Fuchs, *Zur Unterscheidung von Privatversicherung...,* p. 281.

In social insurance, the premium is set in such a way as to ensure that the balance between the income and expenditure of the insurance fund is achieved in a global account.[3] Therefore, it does not depend on the probability of a particular random event, e.g. age, gender, or health condition of the insured, but on their economic earning capacity (amount of earned income). Social equalisation causes that in social insurance there is no individual equivalence of mutual benefits making up the legal relationship of social insurance, i.e. premium and insurance cover, and within the community of risk, there is an additional redistribution of funds both horizontally (from healthy and professionally active people to the sick and unable to work) and vertically (from the better paid to the less wealthy).[4] The scope of this redistribution may vary in different branches of social insurance. In Poland, it occurs to a large extent in universal health insurance. Its degree is minimal in pension insurance.

Assumptions of the 1999 pension reform

The structure of the pension system currently operating in Poland was determined by the pension reform introduced on 1 January 1999. The reform implemented the postulates formulated in the World Bank report published in 1994 entitled *Averting the Old Age Crisis. Policies to Protect the Old and Promote Growth*. Its basic assumptions included: (1) diversification of pension financing methods, (2) diversification of sources of livelihood after retirement age, (3) change in the construction of pension risk and the conditions for acquiring the right to a pension and (4) application of a new formula for determining the amount of a pension.[5]

The reform first assumed a change in the existing technique of financing pension benefits. It was decided to replace the pay-as-you-go pension system with a structure based on a partial application of the funded method for securing income in old age. The introduction of the funded segment was

3 W. Szubert, *Ubezpieczenie społeczne. Zarys systemu*, Warszawa 1987, p. 15.

4 W. Szubert, *Ubezpieczenie społeczne...*, p. 15; I. Jędrasik-Jankowska, *Pojęcia i konstrukcje prawne ubezpieczenia społecznego*, Warszawa 2017, pp. 32-34.

5 M. Zieleniecki, *Reforma emerytalna – bilans zysków i strat*, "Gdańskie Studia Prawnicze" 24 (2010), p. 523; M. Zieleniecki, *Emerytura pomostowa w nowym systemie emerytalnym*, Fundacja Rozwoju Uniwersytetu Gdańskiego, Gdańsk 2011, p. 69; M.Zieleniecki, *20 Jahre Rentenreform in Polen*, [in:] *Arbeits- und Sozialrecht für Europa. Festschrift für Maximilian Fuchs*, eds. F. Marhold, U. Becker, E. Eichenhofer, G. Igl, G. Prosperetti, Nomos 2020, p. 789.

to contribute to limiting the risks related to demographic factors, pressure from the labour market, and political pressures, to which the previous fully pay-as-you-go pension system was exposed, and thus ensure a higher level of social security.[6] The funded method is traditionally considered immune to these risks, and its partial introduction was supposed to protect the pension system from the inevitable, as it was claimed, collapse due to a lack of funds to finance future pensions. This effect was to be achieved by dividing the uniform pension contribution of 19.52% into two parts. The first, amounting to 12.22% of the base, was transferred to the Social Insurance Institution (ZUS) and was used to finance pensions using the pay-as-you-go method. The second, amounting to 7.3%, was directed to open pension funds (OFEs) selected by the insured and was intended to finance pensions using the funded method. At the same time, this meant a reduction in the revenue of the Social Insurance Fund intended for the current financing of benefits using the pay-as-you-go method. A prerequisite for the success of the reform was finding sources of financing for the resulting shortfalls in the Social Insurance Fund. The authors of the reform assumed that covering the financial deficit of social insurance resulting from the capitalisation of a part of the pension insurance contribution would be possible thanks to the rationalisation of expenditures of the pay-as-you-go segment of pension insurance and using funds coming from the privatisation of state property.[7] In practice, these assumptions turned out to be wrong and the deficit of the FUS was covered through supplementary subsidies from the state budget and budget and commercial loans.[8] In December 2013, a radical change was made to the rules governing the functioning of OFEs in Poland.[9] It assumed: (1) introduction of voluntary transfer of a part of the pension insurance contribution to OFEs, (2) the reduction of the interest

6 Biuro Pełnomocnika Rządu ds. Reformy Zabezpieczenia Społecznego, *Bezpieczeństwo dzięki różnorodności. Reforma systemu emerytalno-rentowego w Polsce*, Warszawa 1997, p 4. On the risks in the pension system see also: M. Góra, *System emerytalny*, Warszawa 2003, p. 84-85 and 181.

7 *Bezpieczeństwo dzięki różnorodności*, pp. 102-111.

8 The unrealistic assumptions of the authors of the reform were pointed out as early as in 1998 in: W. Muszalski, *Finansowanie i organizacja ubezpieczenia społecznego. Istotne metody i cele reformy emerytalnej*, [in:] *Wybrane zagadnienia prawa pracy i ubezpieczeń społecznych*, t. 6, ed. U. Jackowiak, Gdańsk 2000, p. 126. The practice of the Social Security Fund borrowing from the budget and the free market raised the concerns of see: K. Antonów, *Finansowe aspekty ubezpieczeń społecznych*, "Praca i Zabezpieczenie Społeczne" (2002) nr 11, pp. 5-6.

9 It was made by virtue of the Act of 6 December 2013 on amending certain acts in connection with determining the rules of payment of pensions from funds accumulated in open pension funds ("Dziennik Ustaw" 2013, item 1717.)

rate of the contribution transferred to open pension funds, (3) compulsory redemption of 51.5% of the settlement units recorded in the accounts of OFE members, (4) transfer to the FUS of assets with a value equivalent to the redeemed settlement units and recording on individual subaccounts of insured persons kept by the ZUS the value of these units, and (5) the liquidation of lifelong capital pensions and the transfer of funds accumulated in OFEs to the FUS through the mechanism of the so-called "safety slide." (6) The liquidation of life-long capital pensions and the transfer of funds collected by OFEs to the FUS through the so-called safety slide mechanism. The application of the safety slide mechanism was tantamount to complete abandonment of the capital-based method of financing pension benefits. It assumes that for a period of 10 years, the equivalent of 1/120 of the assets accumulated by the insured in the OFE is transferred monthly to the FUS pension fund. These funds are recorded on the insured's sub-account with ZUS and are used to finance current pension payments using the pay-as-you-go method. The amount of the funds deposited then increases the basis for the assessment of the pension from the Social Insurance Fund. When the insured reach retirement age, the last tranche of funds accumulated in OFEs is transferred to the FUS and is used to cover current expenditure on benefits.[10]

In addition to changes in the basic pillar of the pension system, the 1999 reform assumed the development of a segment covering various forms of voluntary savings supported by the state, which could constitute a supplementary source of income for future pensioners after they reach retirement age. This pillar of income security in old age was to cover around 25% of the population. During the 22 years that the reformed pension system has been in force, four legal instruments have been introduced enabling the accumulation of funds with a view to using them after reaching retirement age. Employee pension schemes (EPPs), introduced under the 1997 Act, and employee capital plans (ECPs), introduced on 1 January 2019, are forms of group voluntary, long-term accumulation of funds for an additional pension. Individual Retirement Accounts (IKE), introduced in 2004, and Individual Retirement Security Accounts (IKZE), introduced in 2011, allow individual, voluntary and long-term saving for old age.

10 *Prawne mechanizmy przekazywania środków OFE. Oceny konstytucyjno-prawne*, ed. R. Pacud, Kraków 2013, pp. 9-21; M. Zieleniecki, *20 Jahre Rentenreform in Polen*, p. 795.

The pension reform assumed taking steps to increase the effective retirement age. To this end, it was decided to change the existing pension risk structure and to exclude the possibility of early retirement. It is assumed in the literature that in the old pension system, the right to a pension was based on the construction of presumed inability to work due to age and service. In the defined-contribution pension system, the presumption of service (insurance seniority) was abandoned as a prerequisite for acquiring the right to a benefit. The right to a pension was based on the construction of the risk of living to the pensionable age.[11] In the new pension system, the contributory and non-contributory periods play only the role of a premise that determines whether the insured person is covered by the guarantee of obtaining the lowest benefit. As a result, every person who has reached any, even minimum, period of insurance acquires the right to a pension. However, only persons who have completed a contributory and non-contributory period of at least 20 years for women and 25 years for men are guaranteed that their pension will not be lower than the amount of the lowest pension defined by law. The new pension risk structure is consistent with the assumptions of the defined contribution pension system, where the amount of pension depends on the value of the pension contribution made to the Social Insurance Fund during the period of professional activity and not on the length of the period of contribution, let alone the so-called non-contribution period.[12]

The elimination of the possibility of early retirement and the increase in the statutory retirement age in 2012 contributed to a significant increase in the so-called effective retirement age. On the eve of the reform (in 1998), women in Poland retired at an average age of 54.7 years and men at 58.7 years. In 2016, the actual retirement age was 61 for women and 63.3 for men. In 2017, the legislator decided to return to the retirement age of 60 years for women and 65 years for men which resulted in a reduction of the actual retirement age for women. In 2018, it was 60.7 years for women and 64.4 years for men. It should be stressed that in the 20 years since the beginning of the pension reform, the extent of the gradual elimination of the possibility of early retirement has been reduced.[13]

11 K. Antonów, *Prawo do emerytury*, Kraków 2004, pp. 37-45.
12 M. Zieleniecki, *20 Jahre Rentenreform in Polen*, p. 802.
13 M. Zieleniecki, *20 Jahre Rentenreform in Polen*, p. 803.

The most durable element of the pension reform is the introduction of a new mechanism for determining the amount of the pension called the defined contribution formula. It makes the amount of the future pension dependent on the value of the pension contributions made during the period of being insured and the age of the person retiring.[14] The importance of this change is demonstrated by the fact that the term of the new benefit formula (the so-called defined contribution mechanism) is used as the name of the pension system covering persons born after 31 December 1948.[15] It was based on the principle of a close link between the pension insurance contribution paid during the period of being subject to insurance and the benefit. In both segments of compulsory pension insurance, the amount of the benefit depends directly on the value of contributions recorded (accumulated) in the individual account of the insured person during his/her professional activity and the age of retirement. The characteristics of the new formula for determining the amount of the benefit are complemented by mechanisms aimed at maintaining (increasing) the real value of contributions (valorisation and investment activity) and the institution of the so-called initial capital, which illustrates the estimated value of benefits that people covered by the new pension system could count on due to paying social insurance contributions before the date of the pension reform.[16] The defined contribution formula includes economic incentives for extending the time of retirement. Postponing the decision to retire makes it possible to achieve the effect of a significant increase in the pension due as a result of extending the period of paying contributions and shortening the statistical period for receiving the benefit.[17]

The introduction of a new formula for calculating pension benefits meant a significant reduction in the redistributive function of social insurance, which was fulfilled by the previous system (the so-called defined benefit system). This was expressed by resignation from the so-called social part of the pension and from taking into account, when establishing the amount of the pension, periods for which no pension insurance contributions are paid, as well as the determination of the maximum annual basis for the assessment of

14 M. Zieleniecki, *20 Jahre Rentenreform in Polen*, p. 804.

15 The etymology of the term 'defined contribution' is explained at length see: J. Jończyk, *Prawo zabezpieczenia społecznego*, pp. 111-112.

16 J. Stelina, *Kapitał początkowy* [in:] *Leksykon prawa ubezpieczeń społecznych. 100 podstawowych pojęć*, ed. A. Wypych-Żywicka, Warszawa 2009, p. 82.

17 M. Zieleniecki, *Emerytura pomostowa*..., p. 76.

contributions for pension and disability insurance. In place of the mechanism in which the principles for calculating pensions were defined by law and known to the insured (for each year of insurance, an increase by a specified percentage amount of remuneration), a principle was introduced in which the amount of benefit depends exclusively on the amount of contributions paid in the period of insurance and on the index of valorisation or the results of the investment activity of Open Pension Funds.[18]

The limitation in the new pension system to a minimum of social functions realised by the pension system was criticised by the doctrine of social insurance law. It was argued that the essence of both social and economic insurance is the removal or mitigation of the effects of random events from the funds created by the collective efforts of the insured.[19] In both branches of insurance, separate communities of persons are exposed to similar fortuitous events and jointly bear the burden of individual risks from a collective fund in return for participation in its creation.[20] In the classic model of social insurance, however, the redistribution of resources from the insurance fund takes place to an extent unequal to the share in its creation. This is due to the fact that in social insurance the amount of the premium is determined by the amount of income obtained by the insured (and not the risk of damage), and benefits are due only to those members of the risk community who have been affected by a specific event. Meanwhile, the new pension system was based on the principle of equivalence of contributions and benefits, which is characteristic of civil law constructions of personal insurance. In this system, pensions take on an individual character, and the significance of social solidarity is reduced.[21] The responsibility for the size of the future pension benefit is borne by the insured themselves. It is their resourcefulness in life, measured by their earnings and the length of their working lives, that will predominantly determine the size of future pension benefits. The standard of living after

18 M. Zieleniecki, *Reforma emerytalna – bilans zysków i strat*, „Gdańskie Studia Prawnicze" 24 (2010), p. 531; M. Zieleniecki, *Emerytura pomostowa*..., p. 76.

19 T. Zieliński, *Ubezpieczenia społeczne pracowników*, Warszawa-Kraków 1994, p. 24.

20 According to Z. K. Nowakowski and A. Wąsiewicz, the awareness that sharing the risk of adverse effects from random events is significantly more beneficial for the individual constitutes the guiding principle of all insurance. See: Z. K. Nowakowski, A. Wąsiewicz, *Prawo ubezpieczeń majątkowych i osobowych*, Warszawa-Poznań 1973, pp. 5-6. See also: W. Szubert, *Ubezpieczenie społeczne.*

21 R. Pacud, *Zasady prawa emerytalnego*, „Państwo i Prawo" 3 (2003), p. 59; M. Zieleniecki, *Emerytura pomostowa*..., p. 77.

reaching retirement age will be determined not only by the amount of benefits financed from the two compulsory segments of pension insurance but also by individual decisions on using the possibility of voluntary fundraising for old age in the so-called third pillar.[22] The literature on the subject rightly notes that basing the mechanism of calculating pension benefits on the defined contribution formula favours the maintenance of income stratification of the population after reaching retirement age. This is because the new pension system is only beneficial for those who, over a sufficiently long period of being insured, will achieve an income significantly higher than average.[23] For the vast majority of insured persons, the new principles for calculating the amount of pension entail a lowering of the standard of social security in the event of living to retirement age.[24]

Legal nature of the new pension system

The introduction of new legal solutions assuming diversification of sources and methods of financing benefits as well as the application of the defined contribution formula in calculating the amount of the old-age pension have led to a discussion on the legal nature of the new pension system. Three positions have been presented in the literature on this issue.

According to the first one, benefits paid from both segments of the pension system do not have an insurance character, and pensions financed by the capital-based method are located outside the broadly understood social security system.[25] Among the arguments in favour of the non-insurance character

22 M. Zieleniecki, *Reforma emerytalna*..., p. 531, M. Zieleniecki, *Emerytura pomostowa*..., p. 77.

23 This aspect of the introduction of the defined contribution formula is highlighted in: J. Jończyk, *Nowe prawo emerytalne*, p. 41; see also: K. Antonów, *Prawo do emerytury*, p. 53.

24 In particular see: K. Kolasiński, *Konstytucyjne prawo do zabezpieczenia społecznego a nowy system ubezpieczeń społecznych*, "Państwo i Prawo" 5 (1999), p. 9; J. Jończyk, *Kosztowna prywatyzacja ryzyka starości*, „Rzeczpospolita" 23.04.1997, p. 17. The authors of the pension reform assess the effects of the introduction of the defined contribution formula differently in the document Safety through diversity. In their opinion, the lack of income redistribution in the pension system will result in an expansion of the poverty sphere by about 1%, an increase in the number of households which will feel the worsening of their situation by about 17% and an increase in the number of households which will feel an increase in income by about 9.5%: *Bezpieczeństwo dzięki różnorodności*, p. 46.

25 He expressed this view when assessing the assumptions of the draft new pension system: J. Jończyk, *Kosztowna prywatyzacja*..., p. 17.

of the new pension system was the lack of such basic social insurance categories as community of risk, solidarity in life's needs, self-government, the public character of the insurance institution, or state guarantees in cases of extraordinary losses in the system.[26] The application of the defined contribution formula in calculating the amount of benefits deprived the new system of the essential feature of all insurance, which is the determination of the insurance amount, i.e. the sum that can be expected in the event of the occurrence of an insured event.[27] According to this concept, in both the pay-as-you-go and funded segments of pension insurance, there is a change in the way an individual is protected against the risk of reaching retirement age. Social insurance is replaced by compulsory saving for old age.[28]

According to the second concept, despite changes aimed at reducing the redistributive function, the pay-as-you-go segment of the pension system has retained its previous insurance character. This is evidenced by such features as its universality and compulsory character, the public character of the institution administering the system, the existence of a contribution that constitutes revenue for the pension fund, the pay-as-you-go method of financing benefits, the existence of a valorisation mechanism guaranteeing the preservation of the value of the contribution, or securing a minimum income in old age by increasing the due benefit (from both segments) to the amount of the lowest pension.[29] The use of the defined contribution method in the so-called first pillar does not exclude the insurance character of this segment, because the method of individual accounts used in it only means keeping a "register of payments and withdrawals," which is not equivalent to keeping an account within the meaning of banking law.[30] The capital segment of the pension system is of a different character. The institutions that administer this system

26 J. Jończyk, *Kosztowna prywatyzacja*..., p. 17.

27 K. Kolasiński, *Konstytucyjne prawo*..., p. 9.

28 T. Zieliński, *Nowe emerytury — samoubezpieczenie na starość,* [in:] *Konstrukcje prawa emerytalnego*, ed. T. Bińczycka-Majewska, Zakamycze 2004, p. 21; J. Jończyk, *Nowe prawo emerytalne*, „Państwo i Prawo" (1999) nr 7, p. 41; U. Kalina-Prasznic, *Uwagi o reformowaniu systemu emerytalnego*, „Praca i Zabezpieczenie Społeczne" 9 (1997), p. 2; *Uwagi na temat reformy ubezpieczenia społecznego pracowników*, „Praca i Zabezpieczenie Społeczne" (1999) nr 1, p. 4; K. Kolasiński, *Konstytucyjne prawo*..., p. 9; M. Zieleniecki, *Emerytura pomostowa*..., p. 78.

29 He draws attention to this: K. Antonów, *Prawo do emerytury*, pp. 60-61.

30 M. Rymsza, *Docelowy model ubezpieczeń społecznych w Polsce*, „Praca i Zabezpieczenie Społeczne" (1998) nr 9, pp. 6-7.

are private, and their activities are profit-oriented.[31] Benefits due in the case of the occurrence of a fortuitous event are not defined in this system, and the insured have been transferred the risks connected with the functioning of the managing entities. This system lacks any manifestation of solidarity between fund members, which is a consequence of paying contributions to individual accounts in OPFs, and benefits are financed using the capital-based method.[32] The analysis of the scope of activity conducted by Open Pension Funds leads the supporters of the discussed concept to the conclusion that in this case we are not dealing with social insurance, but with a new technique of securing income, usually referred to as compulsory saving for old age, which transforms into economic insurance as soon as the funds are transferred to a fund for life.[33] More recent literature rightly points out that the use of the term "saving for old age" in relation to the activities of open pension funds is not correct. Saving in a bank account includes the guarantee that in the event of withdrawal the amount of savings will not be lower than the sum of payments made. Since persons gathering funds for retirement in open pension funds are not covered by such a guarantee, one should rather speak of forced individualised capital investments.[34]

The third position is based on the assumption that the activity of open pension funds cannot be assessed in isolation from the basic objectives of the functioning of the entire pension system. Open pension funds carry out only a part of the tasks performed by various entities (ZUS, Open Pension Funds, life annuity funds) in the capital segment of the pension system. The subject of OFE activity is the investment of funds coming from the part of the pension insurance contribution allocated for financing a capital pension, i.e. a benefit which, similarly to the pension from the Social Insurance Institution, is of a life nature.[35] The activity of an open pension fund covers, there-

31 Different point of view: T. Bińczycka-Majewska, *Konstrukcja zabezpieczenia ryzyka starości w nowym systemie prawnym*, [in:] *Konstrukcje prawa emerytalnego*, pp. 62-63.

32 K. Antonów, *Prawo do emerytury*, pp. 60-61.

33 U. Kalina-Prasznic, *Uwagi na temat reformy...*, p. 7; K. Antonów, *Otwarte fundusze emerytalne w systemie zabezpieczenia społecznego w Polsce*, „Praca i Zabezpieczenie Społeczne" (1999) no. 11, p. 14; K. Ślebzak, *Próba charakterystyki prawnej ubezpieczenia społecznego pracowników*, „Państwo i Prawo" (2001) no. 12, pp. 79-80.

34 U. Kalina-Prasznic, *Otwarte fundusze emerytalne...*, p. 54; M. Zieleniecki, *Emerytura pomostowa...*, p. 79.

35 This principle does not apply to insured persons drawing a capital periodic pension. During the period of drawing of this pension, the activity of an open pension fund also covers the realisation phase of the pension insurance relationship.

fore, only a part of the pension insurance relationship called the guarantee phase. When an application for a pension is submitted, the Social Insurance Institution takes over the task of paying out the pension financed entirely by the pay-as-you-go method. According to advocates of this concept, saving for old age could be legitimately discussed only when the exhaustion of the funds accumulated by the insured (caused by reaching a higher than average age) would deprive the insured of the right to a pension.[36] The discussed view is also confirmed by the wording of Article 3 (1) (2) of the Act on the Social Insurance System, which lists open pension funds among the entities performing social insurance tasks.[37]

Conclusions

I share the view on the insurance character of the new pension system. It is true that the essence of social insurance includes social equalisation of benefits understood in such a way that the lowest earners receive a relatively higher benefit than would result from the amount of contribution paid by them. However, this feature is not unconditional. Limitations of the principle of equivalence of benefits and contributions are applied only in cases where it is purposeful to reduce the burden on weaker economic units at the cost of a greater burden on stronger economic units. The existence of full equivalence of contributions and benefits does not exclude the insurance character of a given system.[38]

Also, in the new pension system, one can see elements indicating that the system performs, to a very limited extent, a redistributive function. This role is fulfilled by the guarantee of the lowest pension in the case when the pension from the Social Insurance Fund does not reach the minimum amount set by law. It is an expression of solidarity in society as a whole, rather than solidarity within the community of risk, as the compensation of the due benefit

36 J. Jończyk, *Prawo zabezpieczenia społecznego*, p. 131. Supporters of this concept seem to include: T. Bińczycka-Majewska, *Konstrukcja zabezpieczenia ryzyka starości*..., pp. 66-67; K. Antonów, *Prawo do emerytury*, pp. 60-61.

37 This is pointed out in: K. Antonów, *Prawo do emerytury*, p. 60; M. Zieleniecki, *Emerytura pomostowa*..., p. 80.

38 M. Zieleniecki, *Emerytura pomostowa*..., p. 80; J. Piotrowski, *Zabezpieczenie społeczne*..., p. 172; J. Łazowski, *Wstęp do nauki o ubezpieczeniach*, Warszawa 1948, pp. 13-14.

to the amount of the minimum pension is financed from the state budget and not from the resources of the insurance fund.[39] The new pension system also assumes that there will be a redistribution of funds between those entitled to a pension, who have not reached the average life expectancy of people at the age corresponding to their retirement, and pensioners drawing the benefit for a longer period.

The concerns formulated by the doctrine even before the pension reform began are confirmed by statistical data on the development of the replacement rate by pensions calculated according to the defined contribution formula. As recently as in 2012, the average pension paid by ZUS amounted to PLN 1872.32, which was 60.8% of the average salary. At the end of 2020, the average pension paid by ZUS was PLN 2486.81, which was only 53.45% of the average salary.

The decreasing replacement rate is the result of many factors. The most important of these include: (1) the growing share of pensions calculated according to the defined contribution formula in the structure of pensions paid by the Social Insurance Institution (ZUS), (2) the dynamic growth in recent years of the average remuneration in our country, (3) the steady decrease in the share of initial capital in the basis of the dimension of newly awarded pensions, and (4) the increase in the share of pensions lower than the lowest pension benefit in the structure of newly awarded pensions.

The change in the current pension risk structure and exclusion of pension benefits for persons who have not reached the insurance period of 20 years for women and 25 years for men from the guarantee of the minimum benefit caused a sharp increase in the number of pensions, the amount of which is lower than the minimum pension (in 2021, it is PLN 1250.88). As recently as December 2011, the number of people drawing such a pension was only 23.9 thousand. Over 10 years, it increased almost thirteen times, reaching 310.1 thousand in December 2020, and their share in the total number of pensions paid from the new system increased from 4.2% in December 2011 to 9.6% in December 2020. In this group, due to the possibility of retiring at the age of 60, women predominate by far (83%). Recently, however, a gradual increase in the share of men in this population can be observed (from 1.2% in December 2014 to 17% at the end of 2020), as a consequence of the longer insurance length of service required to obtain at least the lowest pension compared to women. This phenomenon results in increasingly frequent postulates being

39 He draws attention to this: K. Antonów, *Prawo do emerytury*, p. 54.

formulated in our country to redefine pension risk in the new pension system and to supplement its design with elements related to longevity.

The decline in the replacement rate has not been stopped by measures taken in recent years aimed at improving the material situation of Polish pensioners, such as a significant increase in the lowest pension benefits, the introduction of the so-called 13th pension, or supplementing the annual percentage valorisation of pension benefits with a minimum increase amount.[40]

Abstract

Solidarity in social insurance on the example of the Polish pension system

The author examines social solidarity and its role in social insurance, focusing on Poland's reformed pension system. Key aspects analyzed include pension financing methods, risk structure, eligibility conditions, and benefit calculations. The 1999 reform significantly reduced the system's redistributive function, yet traces of this function persist. One example is the guarantee of a minimum pension, financed by the state budget, which reflects societal solidarity rather than solidarity within the insured risk community. The system also redistributes funds between pensioners who exceed or fall short of the average life expectancy at retirement. The author concludes that the reformed pension system retains its insurance character. While social insurance includes an element of benefit equalization, granting relatively higher benefits to low earners, this is applied selectively to alleviate economic disparities. Full equivalence between contributions and benefits does not negate the system's insurance nature.

Keywords: solidarity, social security, pension system, old-age pension

40 M. Zieleniecki, *20 Jahre Rentenreform in Polen*, p. 805.

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The triple threat of artificiality: artificial intelligence, artificial wealth, and artificial ethics

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A new digital geography

The future of work in the new post-pandemic economy suffers from a triple threat: artificial intelligence, artificial wealth, and artificial ethics. Job automation and remote work are writing a new page of globalization where distances are reduced to zero in virtuality. Trade in services is gaining more and more weight compared to trade in goods.[1] The exchange of products produced in factories and transported in containers coexist with the instantaneous exchange of data in a hybrid physical and digital model.

In a first phase, companies relocated their production where they found cheaper workers. In the next stage, relocation is more frequent where there are indispensable workers, with the right skills and irreplaceable presence. Production becomes extremely decentralized. In the new economy, services can be aggregated at zero marginal cost in a supply that takes shape globally and tends to infinity. For example, in a social network, millions of users can

1 Without considering the effect of the pandemic, which had a particular impact on trade in tourism services, in recent years, while trade in goods remained stagnant, trade in services increased by 12%. This trend is in addition to a "servicefication," the increasing participation of services as intermediate inputs in the production of material goods. See: United Nations Conference on Trade and Development (UNCTAD), *Informe sobre el comercio y el desarrollo 2020 de la pandemia mundial a la prosperidad para todos: Evitar otra década perdida*, New York 2020.

read a message at the same time without additional costs for the source. This was not the case for newspapers or other traditional communication channels. In this hyperconnectivity, there is a dematerialization that allows demands to be satisfied immediately.

For the future of work, the new economy brings both advantages and challenges. Among the positive aspects, it is possible to reduce the most routine tasks or those of greater physical risk, thus reducing occupational accidents and increasing productivity.

New professions are being created where jobs are growing up to three times faster than traditional jobs.[2] This is the case of jobs linked to biotechnology, the care economy, cybersecurity, big data, digital payment, robotics, e-commerce, clean energies, electromobility, or green jobs such as forestry and recycling, to mention just a few.

The negative aspects take the form of a triple threat of artificiality, trickily presented as modernity. Their harmful effects need to be counteracted with concrete public policies designed under principles of solidarity, with the ultimate goal of social inclusion through work.

Artificial versus real

First threat. Artificial intelligence and technological unemployment

The final outcome of the use of each new technology will always depend on the set of shared values. The same tool, such as social networks, can serve to educate and include, or amplify bullying and hate. In the past, technological disruptions occurred over decades, giving workers and new generations of students time to adapt. Today, significant transformations take place in just a few years. Creating a paradox, technological unemployment coexists with the difficulty that several industries have in finding qualified workers. While new professions expand, many jobs cease to exist. Useful occupations suddenly look prehistoric, as happened with movie attendants or telephone operators.[3]

2 *Robot-lución. The future of work in Latin America Integration 4.0*, "Integration and Trade" 21 (2017) no. 42, pp. 1-339.

3 In recent years, the work of librarians, translators or travel agents, professions that implied having a great deal of training and experience, has been reduced by more than 20%. On the subject,

The impact is not homogeneous. We are going through a process of hollowing out or polarization of employment.[4] High and low-skilled jobs are the most in demand, while those with intermediate qualifications are the first to be replaced by machines.[5] The result is a middle class in danger of extinction.[6]

Second threat. Artificial wealth and new forms of slavery

In the Encyclical Letter *Fratelli Tutti*, Pope Francis encourages us to confront the effects of the "empire of money," to fight together with popular movements against the structural causes of poverty, the lack of work, land, and housing. He invites us to struggle against the rejection of social and labor rights and to incorporate the poor in "the construction of a common destiny." The transformation of the labor market is accompanied by new forms of slavery that are particularly cruel to migrants without work permits, who are victims of the abuse of organized groups that profit from this fragility.

Francis also warns that the throwaway culture is "expressed in multiple ways." One of them is the "obsession with reducing labor costs" in order to obtain excessive revenues, without realizing the serious consequences it causes in terms of employment and poverty. In the digital age, global workers are unprotected by outdated laws that need to be adapted to the new times. But the often well-founded fear of unions losing rights can paralyze the necessary renewal of labor standards.

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see the studies in: M. Rhisiart, R. Miller, S. Brooks, *Learning to Use the Future: Developing Foresight Capabilities Through Scenario Processes*, "Technological Forecasting and Social Change" (2015) no. 101, pp. 124-133; and also: United Nations Conference on Trade and Development, *Robots and Industrialization in Developing Countries*, UNCTAD Policy Brief, 2016, No. 50.

4 McIntosh describes early fragmentation trends. See: S. McIntosh, *Hollowing Out and the Future of the Labour Market*, London 2013.

5 On the impact of innovation on the labor market and wage disparity, see the articles: D. Acemoglu, D. Autor, *Skills, Tasks and Technologies: Implications for Employment and Earnings*, "Handbook of Labor Economics" Vol. 4, Part B, 2011, pp. 1043-1171, and also: D. Autor, *Skills, Education, and the Rise of Earnings Inequality Among the 'Other 99 Percent'*, "Science" 344 (2014) no. 6186, pp. 843-851.

6 Frey estimates that, in the first industrial revolution, labor productivity grew by 46% but real wages grew by only 12%. As a result, income inequality worsened. See: C. Frey, *The Technology Trap: Capital, Labour and Power in the Age of Automation*, New Jersey 2019.

Third threat. Artificial ethics and individualism

With an artificial ethics, if greed is the only force that moves the invisible hand of the market, the society of the future will be full of unemployment and exclusion. The digitalization of daily life can affect perceptions of what is fictitious and what is real, diminishing the capacity to pay attention to the flesh-and-blood people around us and their needs.

Thirty years ago, David Card, winner of the Nobel Prize in Economics in 2021, debunked false myths about the labor market, such as that an increase in the minimum wage generates unemployment or that immigration means fewer job opportunities for natives.[7] But other myths persist and seem difficult to dismantle. One of them says that any regulatory action taken by a state violates individual freedom. Another myth assumes that any redistributive action, even though legitimate taxation, represents an act of injustice to the fair winners of a market economy. Without a fraternal worldview and a holistic perspective that considers the common good, the walls of prejudice that separate us will remain, and many societies will continue to be divided in two.

Politics of the concrete

Algorithms of hate versus algorithms of life

We must put before artificial intelligence a conception of work centered on people, on each worker, on their inalienable rights, and on the value of each individual contribution to social wellbeing. The automation of tasks and technological unemployment can only be faced with a true revolution in education at all levels, where the State must have a leading role. Education related to the jobs of the future, cutting-edge education linked to innovation, education for inclusion, education for reskilling, and education to democratize knowledge.

We need to implement ambitious citizen digital literacy programmes to have a modern and specialized working class. Cultivate soft skills, emotional intelligence, empathy, creativity, problem-solving, and discovery of new

7 The work was concerned with empirically overturning some previously held assumptions about the labor market. See: D. Card, A. Krueger, *Minimum Wages and Employment: A Case Study of the Fast-Food Industry in New Jersey and Pennsylvania*, "American Economic Review" 84 (1993) issue 4, pp. 772-793.

problems. Nurses, psychologists, social workers, and teachers are tasked with a vast human-centered content that cannot be robotized. Conditional cash transfers were responsible for much of the reduction in inequality in Latin America.[8] Those programmes can be linked to training processes in green jobs, the care economy, big data, and basic programming for the digital economy. These will lead to this gradual citizen literacy and prepare us for cobotization, interaction with robots, and virtual assistants, increasingly common in the platform economy.

Not everyone has the ability to reinvent themselves immediately. Certain companies have done it successfully; for example, Kodak has refocused its business on digital printing. Others have failed or have been overtaken by some technological disruption, with Blockbuster being the paradigmatic case. But people are not companies. They have other cultural, age and mental obstacles. Labor market reinsertion requires patience, support, follow-up and continuous training. Educational systems need to be updated to offer instruction in the new skills required. It is up to public policies to ensure that technological changes promote more quality employment and not less. An inclusive offer of updated educational content is the best guarantee we have to make this happen.

Dignity of work and spiritual wealth

To the artificial wealth proposed to us by materialistic worldviews, we need to place a spiritual wealth made up of relational goods.[9] With the sense of belonging to a community, to a multidimensional family that is social and ecological, and with the joy of serving others while loving our work. The most precious goods are always those we share. This dignity, which is found in the daily work of feeling useful to others, suffers today from the attack of two extreme distortions.

On the one hand, about 30% of the world's labor force works more than 48 hours per week, a duration that is associated with an increase in domestic

8 Almost 30% improvement in indicators such as infant mortality, malnutrition, school attendance and the Gini index, which measures income inequality. See: L. Bértola, J. Williamson, *La Fractura. Pasado y presente de la búsqueda de equidad social en América Latina*, Buenos Aires 2016.

9 For a conceptual analysis of relational goods see: P. Donati, *Los bienes relacionales y sus sujetos: el germen de una nueva sociedad civil y democracia civil*, "Recerca: revista de pensament i anàlisi" (2014) no. 14, pp. 19-46.

violence, a lack of attention to other aspects of life, and a greater risk of accidents, injuries, and illnesses. This raises new issues such as the right to disconnect from remote work and its effective regulation. On the other hand, this global trend coexists with unemployment, which in many developing countries exceeds double digits, or with underemployment due to insufficient working hours.

Due to legal gaps found through the misuse of new technologies, working hours are reduced in order to lower the potential cost of layoffs. It is essential to establish new legal frameworks that guarantee the social rights of new types of work, freelance workers, teleworkers, and workers of large platforms that provide their own capital as tools.

A regulatory update should serve to expand rights, and not to restrict them. It should protect workers against the throwaway culture that finds its breeding ground in the digital economy and anticipate the fiscal problems arising from the underfunding of pension systems. Many countries still allocate significant amounts of their budgets to social assistance plans which, although they represent an essential safety net, should tend to be converted into formal jobs. Trade unions have a fundamental role to play in bridging the gap between transitory social aid and the dignity of work.

The Social Doctrine of the Church pays special attention to unions as an expression of solidarity among workers. The Magisterium recognizes their fundamental function, considering them a constructive factor of social order and an indispensable element of social life, but it also calls on them to "overcome the temptations of corporatism." In order to advance in these reforms, we need a solid career in the public sector and public servants who can face the challenges caused by the new technologies for employment.

Global ethics of solidarity

To the artificial ethics proposed by individualism, we must confront an ethic of solidarity. Frey estimates that, in the first industrial revolution, labor productivity grew by 46% but real wages grew by only 12%. As a result, income inequality worsened. See. C. Frey, *The Technology Trap: Capital, Labour and Power in the Age of Automation*, Princeton University Press, New Jersey 2019. We need to globalize workers' rights with a multilateral effort to harmonize regulations and standards between countries. A technological social contract

that strengthens genuine jobs as the true pillar of development, innovation, environmental protection, and the strengthening of democracies. A pact that leads to a fusion of development policies and social policies. But as long as 19th-century working conditions coexist with 21st-century technologies, social conflict will be just around the corner, and democracies will continue to be easy prey to extreme and populist speeches. Science and conscience are the engines for deploying public policies based on one of the great lessons of the 20th century: the fragility of non-inclusive democracies. Decisions such as the tax on large corporations and a greater emphasis on fighting tax havens enable a more equitable distribution of digital dividends. They also allow countries to have the necessary resources to implement high-impact public policies to reduce poverty and inequality.

There are many other examples of international cooperation underway for improving the global financial architecture, the defense of migrants, and the fight against terrorism. There are even proposals to finance social policies by taxing robots, not to slow down technological progress, but to better distribute its costs and benefits.

While distances are disappearing in cyberspace and globalization is entering a phase where borders are vanishing, worker defense rules have only national scope. The collaborative economy and transnational platforms, where the figures of entrepreneur and worker are mixed, need clearer regulations. A new generation of workers' rights should also be at the core of a global post-pandemic agenda to reach consensus. To achieve that goal, we need to build solid and permanent channels of multisectoral dialogue between the private sector, workers, civil society, academia, and scientific and technological systems. We need to sit at the same table. Joint solutions, in a coordination that is both regional and global, will always provide a fairer and more equitable result than the selfish pull-out of individual interests. This is the most important job for good politics. Detoxify ourselves of hostility and artificial divisions to recover the sense of communion and fraternity based on shared values.

Abstract

The triple threat of artificiality: artificial intelligence, artificial wealth, and artificial ethics

The article addresses the issue of work in the new, post-pandemic reality, which is triple-threatened: artificial intelligence, artificial wealth, and artificial ethics. The author analyses these threats, especially in the context of work, and attempts to indicate how to act against them. It calls for the globalisation of workers' rights through multilateral efforts to harmonise regulations and standards between countries, as well as the establishment of lasting and effective channels of dialogue between the private sector, workers, civil society, academia, and scientific and technological systems. Collective solutions, both at regional and global levels, will always produce more equitable and beneficial results than selfish actions in the interests of the individual.

Keywords: artificial intelligence, artificial wealth, artificial ethics, globalization of workers' rights, global ethics of solidarity

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Gustavo Beliz – is an Argentine politician and expert in global governance. He is a graduate of the School of Law at the Universidad de Buenos Aires (1989) and pursued postgraduate studies at the London School of Economics (1994) after winning a British Council scholarship to research globalisation and state reform. He was a professor at the School of Information Science at Universidad Austral between 1995 and 2001, and a professor at the Master's in Organisational Communications and an associate researcher at the Institute of Advanced Business Studies between 2000 and 2001. In 1987, he won a scholarship to Japan, as part of the cultural agreements signed by President Alfonsín and Prime Minister Nakasone. He was named one of the 10 Outstanding Young People of Argentina by the Junior Chamber of Buenos Aires in 1992. In 1999, Time magazine and CNN included him in their list of 50 Latin American Leaders for the Third Millennium. He is the author and editor of 22 books that analyse the relationship between technological change and the future of work; the new challenges of Artificial Intelligence; the transparency of democratic institutions; and Climate Change in the Latin American context in the light of Pope Francis' Encyclical *Laudato Si'*, among others.

Abstract

Solidarity as a Communion and Brotherhood of Working People

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The monograph "Solidarity as a Communion and Brotherhood of Working People", edited by Władysław Zuziak and Amadeusz Pala, is the second volume in the series "The Idea of Solidarity Today". The book is the result of an international scientific conference held in November 2021. It presents an interdisciplinary approach, analysing contemporary challenges regarding the solidarity of working people from a philosophical, theological, and socio-economic perspective. The publication addresses, in particular, the problem of the globalisation of the world economy at the expense of workers' rights, as well as issues related to crises such as the pandemic. Particular attention was paid to the role of Christianity, which has become the foundation of the Polish experience of solidarity and still has the potential to support the creation of community and bonds of brotherhood among working people.

Keywords: solidarity, communism, globalization, workers' rights, Catholic social teaching

Abstrakt

Solidarność jako wspólnota i braterstwo ludzi pracy

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Monografia "Solidarność jako wspólnota i braterstwo ludzi pracy", pod redakcją naukową Władysława Zuziaka i Amadeusza Pali, jest drugim tomem serii "Idea Solidarności Dzisiaj". Książka jest wynikiem międzynarodowej konferencji naukowej, która odbyła się w listopadzie 2021 roku. Prezentuje interdyscyplinarne podejście, analizując współczesne wyzwania dotyczące solidarności ludzi pracy w perspektywie filozoficznej, teologicznej czy społeczno-ekonomicznej. Publikacja podejmuje zwłaszcza problem globalizacji światowej gospodarki kosztem praw pracowniczych, a także kwestie związane z kryzysami, takimi jak pandemia. Szczególną uwagę zwrócono na rolę chrześcijaństwa, które stało się fundamentem polskiego doświadczenia solidarności i wciąż ma potencjał, by wspierać tworzenie wspólnoty oraz więzi braterstwa wśród ludzi pracy.

Słowa kluczowe: solidarność, komunizm, globalizacja, prawa pracownicze, nauczanie społeczne Kościoła

Contents

With this volume, we offer you the second installment in the series "The Idea of Solidarity Today," which is the result of the international scientific conference entitled *Solidarity as a Communion and Brotherhood of Working People*, held on November 19-20, 2021. The purpose of the conference was to recall the idea of solidarity and to analyze it in international terms, taking into account contemporary realities. The event was organized by the International Center for Study of the Phenomenon of Solidarność (MCBFS), a research unit established by the Independent and Self-Governing Trade Union "Solidarność" and the Pontifical University of John Paul II in Krakow, working in cooperation with the Pontifical Academy of Social Sciences in Rome.

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