

THE PONTIFICAL
ACADEMY OF
SOCIAL SCIENCES

Acta

8

DASGUPTA • DONATI • GLENDON • LLACH
MALINVAUD • RAGA GIL • RAMIREZ
VILLACORTA • ZAMPETTI • ZUBRZYCKI

Intergenerational Solidarity

Edited by E. Malinvaud



VATICAN CITY
2002

*The Proceedings of the Eighth Plenary Session
of the Pontifical Academy of Social Sciences*

8-13 APRIL 2002

INTERGENERATIONAL SOLIDARITY

Address

THE PONTIFICAL ACADEMY OF SOCIAL SCIENCES
CASINA PIO IV, 00120 VATICAN CITY

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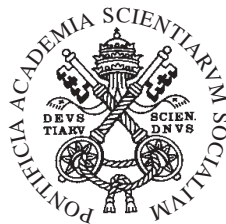
Acta 8

INTERGENERATIONAL SOLIDARITY

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the Eighth Plenary Session of the
Pontifical Academy of Social Sciences
8-13 April 2002



VATICAN CITY 2002

The opinions expressed with absolute freedom during the presentation of the papers of this meeting, although published by the Academy, represent only the points of view of the participants and not those of the Academy.

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Prof. EDMOND MALINVAUD

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THE PONTIFICAL ACADEMY OF SOCIAL SCIENCES
VATICAN CITY



John Paul II



The Pontifical Academy of Social Sciences, Casina Pio IV



The Participants of the Eighth Plenary Session of 8-13 April 2002



The Participants of the Eighth Plenary Session of 8-13 April 2002

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PREFACE

EDMOND MALINVAUD

This volume of proceedings does not conform with the practice followed in the seven previous volumes which resulted from the plenary sessions of the Academy. It is not complete, in the sense that it does not publish all the papers discussed during the eighth session. Indeed, the programme of this last session was atypical: its scientific discussions belonged to the study of three distinct themes for the reason explained here in the Report of the President. Two days were devoted respectively to each theme: globalisation, democracy, intergenerational solidarity.

This volume presents only the papers delivered on the 12th and 13th of April at the roundtable on intergenerational solidarity. The colloquium on globalisation and inequalities is the object of a separate publication: *The Pontifical Academy of Social Sciences: Miscellanea 3*. The roundtable on democracy, with three outside experts, was an intermediate stage in the implementation of the Academy programme on the theme of democracy, which was discussed in a seminar held in 1996 and in two plenary sessions (1998, 2000). In order to draw from this previous work the formulation of elements which the Church can use for the development of her Social Doctrine, written evaluations of the publications which resulted from these meetings were prepared by the three outside experts and discussed at the roundtable. The reports of these experts will be published next year when the report of the Academy will be issued.

The initial intentions of the Academy, as formulated at its first plenary session, were to give some priority, among other themes, to the study of intergenerational solidarity. Nothing could be done for this purpose during the first years. But at the end of 2000 it was decided to open a programme which would extend over several years and which began with the roundtable whose papers are published here. In this first meeting the main purpose was

to sort out the various issues that the Academy should investigate in depth. Already during the early discussions of 1994 there had been some uncertainty about the exact scope of the programme. In particular three questions had been raised to which answers will now have to be given.

How should the Academy delineate the contours of the family problems which it ought to tackle within the new programme? There are a number of aspects which definitely belong to the field of intergenerational solidarity and to which social scientists might usefully contribute: the role of families in the education of children and teenagers, in the support of parents and old-age members, in the provision of a better safety net than may be publicly provided, and last but not least, in contributing to building the cultural environment in which future generations will live. Too often on this last point, however, families enter into conflict with other social forces, and the state itself often disregards or misjudges effects on future generations. The roundtable devoted a good deal of attention to surveying a large part of this complex of problems, with in particular the contributions of Academicians Glendon, Ramirez, Villacorta and Zampetti.

Should the whole set of problems posed by the development and/or reform of the 'welfare state' be considered as belonging to the list of issues that the Academy ought to take up in the near future? These problems were occasionally approached in past years when 'democracy' or 'work and employment' were the main focus. But a clearer view of what the Academy wants to study about them is now needed. Here the paper of Academician Raga Gil surveys the main issues. It will play a central role in our tenth plenary session of 2004, which will be completely devoted to the welfare state, following the recommendation given in the general discussion at the end of the roundtable.

Should the list of problems to be investigated during the next few years also include those concerning behaviour and policies bearing upon the natural environment? Here Academician Dasgupta shows that indeed these problems are serious, particularly for developing countries. No doubt, they will have to be closely studied.

In conformity with what was decided in 1995 and applied in all three of the programmes undertaken earlier, a paper had to be prepared on the Social Doctrine of the Church, so as to serve as a reference in the forthcoming investigations of the Academy on intergenerational solidarity. The essay I wrote for the purpose is here published.

These proceedings contain two other contributions of a transversal nature, both written by Academician Donati. The first one, distributed a

year ago to a number of participants at the roundtable, is meant to cover the whole theme. It is entitled *Intergenerational solidarity – a sociological and social policy issue*. The second paper deals with the basic ethical principle of equity, in the same broad framework (*Equity between generations – a new social norm*). It is a pity that our colleague Donati had to cancel at the last moment his participation in the session, on medical instructions following serious health trouble. In his absence, his two papers were discussed, but unfortunately too briefly.

VIII Plenary Session: 8-13 April 2002

GENERAL PROGRAMME

COLLOQUIUM ON GLOBALISATION AND INEQUALITIES

ROUNDTABLE WITH OUTSIDE EXPERTS ON THE SOCIAL
DOCTRINE OF THE CHURCH ON DEMOCRACY

ROUNDTABLE ON INTERGENERATIONAL SOLIDARITY

COLLOQUIUM ON GLOBALISATION AND INEQUALITIES

MONDAY 8 APRIL

Word of Welcome: Professor EDMOND MALINVAUD, President of the
Academy

The Subject of the Colloquium: Professor LOUIS SABOURIN, Chairman of
the Colloquium (Pontifical Academician, Montreal)

Inequalities in the Light of Globalisation

Professor DENIS GOULET (Notre Dame University, USA)

Comments by Academicians and Experts

*Globalisation and International Inequalities: Changing North-South
Relations*

Professor JUAN JOSÉ LLACH (Pontifical Academician, Argentina)

Comments by Academicians and Experts

The Impact of International Finance and Trade on Inequalities

Financing and Loans

Mr. MICHEL CAMDESSUS (Former Director General of the IMF, France)

Trade

Mr. ABLASSÉ OUÉDRAOGO (Deputy Director General of the WTO, Burkina Faso)

Comments by Academicians and Experts

TUESDAY 9 APRIL

Globalisation, Religion and Poverty

Professor ANDREA RICCARDI (Founder of the Comunità di S. Egidio, Italy)

Dr. STAN D'SOUZA, S.J. (Co-ord., Int. Population Concerns, India)

Abbé RAYMOND B. GOUDJO (Benin)

Professor ROBERTO PAPINI (Sec. Gen., Jacques Maritain Int. Inst., Italy)

Mr. JEAN-MARIE FARDEAU (Sec. Gen., CCFD, France)

Comments by Academicians and Experts

General Discussion

Conclusions and Proposals for the General Assembly of 2003

Meeting of the Council

ROUNDTABLE WITH THREE OUTSIDE EXPERTS ON DEMOCRACY

WEDNESDAY 10 APRIL

The Value and the Values of Democracy

Professor SERGIO BERNAL RESTREPO (Pont. Univ. Gregoriana, Colombia)

Professor MICHAEL NOVAK (American Enterprise Inst. For Public Policy Research, U.S.A.)

Professor RUDOLF WEILER (Institut für Sozialethik, Austria)

General Discussion

Democracy and Civil Society

Professor SERGIO BERNAL RESTREPO

Professor MICHAEL NOVAK

Professor RUDOLF WEILER

General Discussion*Democracy, Welfare and the International Community*

Professor SERGIO BERNAL RESTREPO

Professor MICHAEL NOVAK

Professor RUDOLF WEILER

THURSDAY 11 APRIL

General Discussion on Democracy, Welfare and the International Community**Papal Audience and Photograph with the Holy Father***The Message of the Academy: To Whom should it be Addressed and how should it be Propagated?*

Professor SERGIO BERNAL RESTREPO

Professor MICHAEL NOVAK

Professor RUDOLF WEILER

General Discussion**Closed Session for Academicians****ROUNDTABLE ON INTERGENERATIONAL SOLIDARITY**

FRIDAY 12 APRIL

The Social Doctrine of the Church

Professor EDMOND MALINVAUD

Comments

H.E. Msgr. GIAMPAOLO CREPALDI (Secretary of the Pontifical Council for Justice and Peace, Vatican City)

Msgr. Professor ROLAND MINNERATH (Pontifical Academician, France)

Msgr. Professor MICHEL SCHOYANS (Pontifical Academician, Belgium)

Discussion*A New Model for the Role of the Family in the State*

Professor PIERLUIGI ZAMPETTI (Pontifical Academician, Genoa)

Comments

Professor MARY ANN GLENDON (Pontifical Academician, Harvard)

Discussion

The Natural Environment

Professor PARTHA DASGUPTA (Pontifical Academician, Cambridge)

Comments

Professor BEDŘICH VYMĚTALÍK (Pontifical Academician, the Czech Republic)

Professor JERZY ZUBRZYCKI (Pontifical Academician, Australia)

Discussion

Presentation of two contributions by Professor PIERPAOLO DONATI (Pontifical Academician, Bologna), unable to be present

Intergenerational Solidarity: a Sociological and Social Policy Issue
presented by Professor JERZY ZUBRZYCKI (Pontifical Academician, Australia)

Intergenerational Equity
presented by Professor EDMOND MALINVAUD (President of the Academy, France) and Professor MARGARET ARCHER (Pontifical Academician, Warwick)

Discussion

SATURDAY 13 APRIL

Duties to Teenagers and Young Adults

Professor MINA RAMIREZ (Pontifical Academician, Manila)

Duties of Children to the Elderly

Professor WILFRIDO VILLACORTA (Pontifical Academician, Manila)

Comments: Professor PAULUS M. ZULU (Pontifical Academician, South Africa)

Discussion

A New Shape for the Welfare State

Professor JOSÉ T. RAGA GIL (Pontifical Academician, Spain)

Comments: Professor JUAN J. LLACH (Pontifical Academician, Argentina)

Discussion

General Discussion on Future Activities

Meeting of the Council

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ADDRESS OF THE PRESIDENT TO THE HOLY FATHER

Holy Father,

This year the programme of our plenary session is atypical. For the first time since we began our work in 1994, we have not concentrated the proceedings of a plenary session on one single large subject. Our programme is made up of three consecutive workshops or seminars, dealing respectively with globalisation, democracy, and solidarity between generations. We realised that in all three cases, but for different reasons, our projects would now benefit from shorter meetings.

In your important address on globalisation last year, Your Holiness drew our attention in particular to the priority of ethics and to the two ethical principles that ought to be permanently kept in mind by all those involved in the globalisation process: the inalienable value of the human person and the value of human cultures. Our main concern in the Academy should be to bring out those scientific elements which can bear on the implementation of these principles. This is not an easy task, especially given the present conflict between different visions of globalisation.

After an initial seminar in February 2000, which sought to launch our programme on this subject, and the plenary session devoted to it last year, our seminar this week has focused on inequalities. A main concern has been to understand how changing North-South relations could contribute to alleviating the inhuman burden of poverty in the South.

Our roundtable on democracy this week had the purpose of approaching the final stage of the programme on democracy, which the Academy initiated in December 1996. We discussed the reports of three outside experts who were assigned the function of evaluating with fresh eyes the three publications of the Academy on democracy, and identifying the contribution they could make to the Social Doctrine of the Church. Thanks to these reports and to the discussions at the workshop, we are now reaching the stage when we should be able to draft a resolution of the Academy, which ought to be passed at our next plenary session.

The roundtable on solidarity between generations will keep us busy on Friday and Saturday morning. Its object is to examine how the Academy ought to proceed in order to follow the intention – approved at our first plenary session of November 1994 – of having a programme of work on this subject. No doubt studying this now is also timely.

Such are, Holy Father, the steps we are now taking in our attempt to serve the Church and thus to fulfil the objective you had in mind when you instituted our Academy,

Edmond Malinvaud

ADDRESS OF THE HOLY FATHER
TO THE PARTICIPANTS
OF THE EIGHTH PLENARY SESSION

Mr. President, Your Excellency, Distinguished Academicians,

1. I am delighted to welcome you on the occasion of the Eighth General Assembly of the Pontifical Academy of Social Sciences. In particular, I greet Prof. Edmond Malinvaud, your President, to whom I express my gratitude for his expression of respect on your behalf. I thank Bishop Marcelo Sánchez Sorondo and all who coordinate the work of your Academy. With your interdisciplinary richness, you have chosen to continue your reflection on the themes of democracy and globalisation, thus beginning your research on inter-generational relations. Such a step is valuable for developing the Church's social teaching, for educating peoples and for the participation of Christians in public life in every kind of responsibility for social life.

2. Your analysis also aims at shedding light on the ethical dimension of the decisions that the leaders of civil society and every human being must make. The increasing interdependence among people, families, businesses and nations, as well as among economies and markets – known as globalisation – has revolutionized the system of social interactions and relations. If it has positive developments, it also harbours disturbing threats, notably the exacerbation of inequalities between the powerful economies and the dependent ones, between those who benefit from new opportunities, and those who are bypassed. This fact invites you to think about the subject of solidarity in a new way.

3. In this connection, with the progressive lengthening of the span of human life, solidarity between generations must receive greater attention, with special care for the weaker members of society, children and the elder-

ly. Formerly, in many places, solidarity between generations was a natural family attitude; it also was a duty of the community which had to exercise it in a spirit of justice and equity, making sure that each person has his just share in the fruits of work and in all circumstances lives with dignity. The industrial age saw States set up social welfare plans to assist families, giving special attention to the education of youth and to pension funds for retirees. It is fortunate that a sense of responsibility has developed in people thanks to a real national solidarity, so as not to exclude anyone and to give access to a social benefits coverage to all. One can only rejoice at this progress even though it benefits only a small portion of the world's population.

In this spirit, it is first of all the responsibility of the political and economic leaders to do everything possible to ensure that globalisation will not take place to the detriment of the least favoured and the weakest, widening the gap between rich and poor, between rich nations and poor nations. I invite people who have the responsibility of government and those who make the decisions that affect society to be particularly careful by reflecting on future long-term decisions and by thinking how to create economic and social balances, by putting in place systems of solidarity that take into account the changes caused by globalisation and by keeping these methods from further impoverishing substantial parts of peoples, or even, of whole countries.

4. At the global level, collective decisions must be taken and carried out in a process encouraging the responsible participation of all people, called to build their future together. In this perspective, the fostering of democratic models of government will allow the population as a whole to take part in the administration of the *res publica*, 'on the basis of a correct conception of the human person' (*Centesimus annus*, n. 46), and with respect for basic anthropological and spiritual values. Social solidarity implies putting aside the simple pursuit of particular interests, which must be evaluated and harmonized 'in keeping with a hierarchy of balanced values; ultimately, it demands a correct understanding of the dignity and the rights of the person' (*ibid.*, n. 47). Thus it is only right to give great importance to educating the younger generations in a spirit of solidarity and a real culture of openness to the universal and attention to all people, regardless of their race, culture or religion.

5. The leaders of civil society fulfil their mission when they seek above all the common good with absolute respect for the dignity of the human person. The importance of the questions our societies have to face and the

challenges for the future should stimulate a common will to seek the common good for the harmonious and peaceful development of societies and the well being of all. I invite the administrative bodies that serve the human community, inter-governmental or international organisms, to support the work of the nations with rigour, justice and understanding, in view of the 'universal common good'. Thus in a gradual way the modalities of a globalisation will be guaranteed that is no longer imposed but controlled. Actually, it corresponds to the political sphere to regulate the market, to subject market laws to solidarity, so that individuals and societies are not sacrificed by economic changes at all levels and are protected from the upheavals caused by the deregulation of the market. Once again, therefore, I encourage social, political and economic leaders to go further in the way of cooperation among persons, businesses and nations, so that the stewardship of our earth will be at the service of persons and peoples and not just of profit. Men and women are called to leave behind their selfishness and show each other greater solidarity. In its journey to greater unity, solidarity and peace, may today's humanity pass on to the coming generations the goods of creation and the hope of a better future!

As once again I express my esteem and gratitude for your service to the Church and humanity, I invoke upon you the assistance of the risen Lord and wholeheartedly impart my Apostolic Blessing to you, your families and all your loved ones.

REPORT BY THE PRESIDENT

On 18 October 2001 Father Arthur Fridolin Utz passed away at the age of 93 after a life devoted in the main to studying and propagating the Social Doctrine of the Church. He was the oldest Academician, very much respected and appreciated by his colleagues, who now deeply feel his absence. In January 1990, four years before the creation of the Academy, he was already active and influential within the small group which persuaded Pope John Paul II to decide in favour of its creation. The Academy will always remember his contributions.

This report covers the period from the beginning of May 2001 to 14 April 2002. During this period the Holy Father appointed two new Academicians: Professor José Raga Gil of the University San Pablo, Madrid, on 17 May 2001, and Professor Paul Kirchhof of the University of Heidelberg, on 19 October 2001.

Born in 1938 in Valencia (Spain), Professor Raga Gil held chairs in 'political economy and public finance' at the Universities of Salamanca and Madrid (Autónoma and Complutense) before he became Rector of the University San Pablo (1994-99). He is the author of many publications in Spain and abroad, in particular on public sector economics, income distribution, economic ethics and the Social Doctrine of the Church. For more than twenty years he has been an active member of the International Institute of Public Finance, and was its Executive Vice-President for three years. In the Catholic Church he has accepted many appointments and since 1980 has served as President of the Spanish Social Weeks. He received the Great Cross of Saint Gregory the Great from John Paul II in 2000.

Born in 1943 in Osnabrück (Germany), Professor Paul Kirchhof taught public law at the Universities of Münster and Heidelberg, being in both cases the director of institutes of financial and fiscal law. He has published many books and articles on fiscal law and constitutional law. He is also President of the German Society of Fiscal Law. From 1987 to 1999 Professor Kirchhof was a member of the German Constitutional Court.

This was a very challenging responsibility because, in addition to the constitutional modernization imposed by the progress of science and medicine, and by social changes, Germany had to cope both with reunification and European integration. Recently, he has accepted the position of co-editor of a large encyclopedia on constitutional law, which will be compiled with scientific rigour from various points of view. Ten volumes will be written by some 130 authors.

During the years under review, the Council of the Academy held three meetings: on 15 December 2001, on 9 April 2002 and 13 April 2002. The tempo of activities during the twelve months under review was somewhat affected by the decision to give an original structure to the plenary session of 2002. The decision had been taken in the 2001 General Assembly, in response to a proposal of the Council, that the scientific work of the session would be organized around several main themes instead of just one. Because of the advance of the projects on the three themes which had been earlier selected, on 'labour and employment', 'democracy' and 'globalisation', and because of the launching of the study on the theme of 'intergenerational solidarity', it appeared that each one of them had to be discussed by the Academy for further progress, but that in no case was a full session required for what had to be achieved in the short run. As it turned out, only three of the four themes were examined during the Eighth Session, which however met for a full week. A brief survey of what was done during the year on each programme now follows.

Work and employment

The report published in the Proceedings of the Seventh Session presents the decision, taken by the Academy in April 2001, to try and organize, for the first time, a forum with high figures of the Church. The forum would examine a question, already approached by the Academy, which would be important in the elaboration of the Social Doctrine. The first step in the implementation of the project was for the President to obtain agreement from the Secretary of State of His Holiness on the precise assignment and organization of the first forum. After several exchanges of letters this was achieved in October.

The forum should be understood as a working meeting about future research. The authority of the Magisterium would not be pledged by the positions taken by representatives of the Holy See. For the Academy, the main outcome of the forum will be advice about the approaches it ought to

select in future studies of the subject discussed so that these studies can be useful to the reflections of the Church. The Secretary of State agreed with the choice of the question for the first forum by the Academy, namely 'the meaning of the priority of labour over capital in the present world'. He also accepted the names of personalities to be asked by the President to represent the Holy See.

Unfortunately, time ran short and the first invitations turned out, after several months, to be unsuccessful. In February 2002, wary of the fact that a too hastily prepared forum might jeopardize confidence in that type of dialogue between the Academy and the Church, the President decided to postpone the first forum to April 2003. This decision was accepted by the Secretary of State. The General Assembly, meeting in April 2002, also endorsed it.

The study of democracy

Last year's report explained how the Academy had decided to take advice from outside experts before writing a summary statement about the relevance of its earlier study of democracy for the social teaching of the Church. In the summer of 2001, three experts, who had not been participants in the Academy's programme on democracy, kindly agreed: to read the proceedings of the seminar held in 1996 and of the plenary sessions of 1998 and 2000; to write individual reports on their views about the value of this material for the Church; and finally to present and discuss their reports during a roundtable to be held on the 10th and 11th of April 2002, as part of the Eighth Plenary Session. They were: Professor Sergio Bernal Restrepo, the Gregorian University, Rome; Professor Michael Novak, the American Enterprise Institute, Washington D.C.; and Professor Rudolf Weiler, Institut für Sozialethik, Vienna.

A special small meeting, chaired by Professor Zacher, was held with them at the Academy on the 29th and 30th of November, with the participation of Dr. Filibeck from the Pontifical Council for Justice and Peace. The purpose was to answer the questions of the experts about the background of the publications at their disposal and about the kind of contribution expected from their reports. It was also thought advisable to proceed to a first informal discussion about the likely contents of the respective reports as they were maturing.

The reports were available in February. The roundtable in April was very well attended and very useful. The subject was divided into three main

parts, respectively entitled: 'The value and the values of democracy', 'Democracy and civil society', and 'Democracy, welfare and the international community'. A fourth part of the discussion concerned the nature of the message that the Academy would issue and the form it would take: to whom should it be addressed and how should it be propagated?

With the material thus obtained, a small group of Academicians will first prepare a draft of the intended summary statement. Under the leadership of Professor Zacher, written comments and suggestions will be collected from other Academicians. A second version will be available for discussion and, hopefully, will be approved at the Ninth Plenary Session. The reports of the experts will be published at the same time as the message of the Academy.

The study of globalisation

After the workshop held on 21-22 February 2000, the plenary session of April 2001 and the colloquium of 8-9 April 2002, with the prospect of devoting still another plenary session in 2003 to the same broad theme, the Academy will certainly want to reflect on how to best take stock of this first round of activities on globalisation. This simple consideration was already present in the minds of Academicians during the twelve months under review, when they thought about what the direct outcome of this first phase ought to be. It was particularly present during the General Assembly of 11 April.

Here, what was described in the two previous President's reports will not be repeated. Attention will focus not only on the orientations chosen at the General Assembly but also, in the first place, on the papers discussed at the colloquium and independently published as the booklet *Miscellanea 3* of the Academy.

Two papers dealt with social inequalities, which were the main subject of two earlier contributions by staff members of the United Nations Development Programme, Hakan Bjorkman in 2000 and more fully Zéphirin Diabré in 2001. This year Denis Goulet examined whether globalisation *causes* inequality. He developed an argument, summarized in ten points at the end of his paper. Distinguishing inequality from poverty, he focused attention on the perception that some inequalities are illegitimate; on the process of social and cultural change that brings about such a perception in times of globalisation; on the resulting disarticulation of social bounds; and on possible ways of counteracting this development. Juan

Llach took a long-run view in order to place the wave of globalisation of the last decades in perspective. He argued that the divergence between rich and poor countries coincided with the eve of modern economic growth in the early nineteenth century. He discussed a large body of evidence: first, on the relation between the initial divergence and absolute poverty; second, on the thesis that there have been forms of convergence during the last few decades; and then on various related phenomena. He ended with the presentation of some hypotheses about possible explanations for this lack of convergence.

Two papers dealt with the present international governance of globalisation and its effects on inequalities. Michel Camdessus, the former Director General of the International Monetary Fund, surveyed the large domain that falls under the competence of the Fund and dwelt on the events and problems experienced during the past decades up to the present. He selected three main issues: the financial architecture, with the rules and codes bearing on banking operations; international loans and gifts, with the conditions imposed, particularly regarding good governance; finally debts and debt relief, with their impact on social policies, notably in the poorest countries. Ablassé Ouédraogo, the deputy Director General of the World Trade Organization, first listed the flagrant disequilibria in the trends of world development. He then examined the possible or potential effects of trade liberalization on these trends. Overall, it appears that, up to now, a number of developing countries have not benefited from trade liberalization agreements. The main cause is that these countries suffer from serious obstacles to their exports.

Within the colloquium a large part was also given to testimonies from persons able to report direct evidence on the situation of religions or the fight against poverty in the globalised world. Professor Andrea Riccardi, founder of the Sant'Egidio Community, argued that the culture of 'living together' has now become inevitable, and he explained how the spirit of Sant'Egidio generates friendship with the poor and can even help to transform war into peace. Father Stan D'Souza, S.J., analysed the problems faced by religions and the trends in poverty in India, or more generally in Asia. Father Raymond Goudjo, from Benin, brought a similar testimony from Africa. He also stated that training an elite was the way to eradicate the fatalism of the poor. Roberto Papini, Secretary General of the International Jacques Maritain Institute, focused his presentation on episcopal teachings on the relations between globalisation and poverty. The main challenge faced by these teachings is how to stimulate the emergence,

acceptance, regard for, and promotion of, human values, notably justice and solidarity. This has to be achieved not in opposition to, or even in juxtaposition with, but rather in correlation and symbiosis with, the economic values of growth and efficiency. Jean-Marie Fardeau, the Secretary General of the French Comité Catholique contre la Faim et pour le Développement, spoke about the role Catholic NGOs play in contributing to international solidarity. He considered, in particular, the cultural aspects of globalisation and asked whether Christians were doing enough to value not only material wealth but also other forms of riches found in the family, social relations, cultures, and so on.

The general discussion at the end of the colloquium, and the General Assembly of Academicians two days later, examined the main objective and the procedure for the preparation of the scientific programme of the Ninth Plenary Session. A consensus emerged on the idea that the governance of globalisation had to be the central subject. Since globalisation is a concern for all social sciences, the Academy thought that the next session offered a good opportunity for now experimenting with a new form of procedure. It then accepted a proposal of Professor Sabourin, which was made precise by the Council on 13 April 2002. Five groups were established, each specialized in a field. The chairpersons are: Prof. Archer for sociologists, Prof. Glendon for jurists, Prof. Llach for economists, Prof. Minnerath for experts on morality, Prof. Zulu and Prof. Villacorta jointly for political scientists. Each group will organize discussions lasting half a day. Professor Sabourin will coordinate the progress of the groups. In agreement with the President, he will find the proper balance for the whole programme of the 2003 session.

Intergenerational solidarity

In agreement with the decision reported a year ago, the main objective of the roundtable held on 12-13 April 2002 was to broadly survey the field of intergenerational solidarity and thus gather sufficient material to lead to decisions regarding future activities in this field. The nearest next meeting concerned was the Tenth Plenary Session of 2004. This main objective was achieved.

No presentation of the papers discussed at the roundtable will be attempted here, since they are published in these proceedings. Clearly they cover a wide range: the Social Doctrine of the Church; the ethics of equity between generations; the place of families in political organization; the nat-

ural environment; the sociological approach to intergenerational solidarity; close solidarity between the young and the elderly; and the welfare state. The Academy did not yet want to choose the sketch of a programme extending over a number of future years. But it expressed a clear priority in favour of devoting the 2004 session to the problems of the welfare state.

In any case, the committee in charge of intergenerational solidarity, from now on chaired by Professor Mary Ann Glendon, will have to assist the Academy, first in selecting a good programme on the welfare state to be discussed two years from now, and second in drawing up perspectives on when and how other aspects of intergenerational solidarity should be tackled.

Edmond Malinvaud

PART I

THE SOCIAL DOCTRINE OF THE CHURCH

INTERGENERATIONAL SOLIDARITY IN THE SOCIAL TEACHING OF THE CHURCH

Essay¹

EDMOND MALINVAUD

1. *Introduction*

How does the Social Doctrine of the Church apply to relations between generations? This is a timely question because, at the same time as globalization is transforming the geographical domain of the application of solidarity, the acceleration of the impact of human activity on the future of the earth and our societies, as well as scientific and technical progress in the control of long-run phenomena, are also transforming the inter-temporal domain of the application of solidarity.

From the early days of the Bible, revelation was understood as a message of hope that testified to God's benevolence towards man, and this message was renewed by the presence of Jesus Christ on earth and his resurrection. But the expression and understanding of this message need to be developed if we want to adapt that message to the contemporary age. This was something that *Gaudium et spes* announced: "Today, the human race is involved in a new stage of history. Profound and rapid changes are spread-

¹This text is meant to serve as a background document for the investigation that the Academy wants to devote to the problems now posed by intergenerational solidarity in various parts of the world. A first version was discussed at the 2002 roundtable, in particular by Monsignors Crepaldi, Minnerath and Schooyans. Comments were also made by Academicians Betancur, Dasgupta, Glendon, McNally, Raga, Ramirez, Sabourin, Zacher and Zubrzycki. The author is, however, solely responsible for errors and imperfections. For exact quotations from the Magisterium texts in English he was assisted by Alessandra Petrillo.

ing by degrees around the whole world. ... Triggered by the intelligence and creative energies of man, these changes recoil upon him, upon his decisions and desires, both individual and collective... As happens in any crisis of growth, this transformation has brought serious difficulties in its wake. Hence we can already speak of a true cultural and social transformation, one which has repercussions on man's religious life as well" (4). ... "To a certain extent, the human intellect is also broadening its dominion over time: over the past by means of historical knowledge; over the future, by the art of projecting and by planning. ... Thus, the human race has passed from a rather static concept of reality to a more dynamic, evolutionary one. In consequence there has arisen a new series of problems, a series as numerous as can be, calling for efforts of analysis and synthesis" (5).

When celebrating the thirtieth anniversary of the publication of *Gaudium et spes*, John Paul II did not just show that its *announcement of life and hope* remained perfectly timely notwithstanding the changes that occurred in the world since then. He also wanted to plead for the upholding of the spirit that had inspired its drafting, namely the "realism of hope".² We must keep this approach in mind in this review of the doctrinal writings.

Although the human community was always concerned about its future, it was ignorant of a number of elements that we now partly understand. Certainly, this does not remove the need for hope. But the enlargement of the field of our knowledge also means an enlargement of the field of our responsibilities. Each generation has more and more manifest and extended duties towards the next generations. Such is the context within which we must first recall what the Christian notion of solidarity is and then apply it to relations between generations.

2. *The principle of solidarity*

"In His preaching [Jesus Christ] clearly taught the sons of God to treat one another as brothers. In His prayers He pleaded that all His disciples might be one" (GS. 32).

"It is already possible to point to the *positive and moral value* of the growing awareness of interdependence among individuals. ... It is above all a question of interdependence, sensed as a *system* determining relationships in the contemporary world. ... When interdependence becomes rec-

²See *Gaudium et spes – Bilan de trente années*, No 39 in the journal *Laïcs Aujourd'hui*, Vatican City, 1996.

ognized in this way, the correlative response as a moral and social attitude, as a “virtue,” is *solidarity*.³

The synopsis of social doctrine that the Magisterium will soon publish stresses the increasing importance of the principle of solidarity. It argues in particular that the present social context prompts us to deepen solidarity. Living persons are more and more debtors for all they have received (conditions which make possible and appreciable the quality of life, an indivisible and essential heritage of culture, scientific and technical knowledge, tangible and intangible welfare ...). This debt, which is invaluable and indivisible, does not require what would be an impossible restitution but rather recognition in the form of sustained social actions thanks to which humanity will progress. Nothing should be allowed to hinder us in our attempts, motivated by solidarity, to provide present and future generations with their due.

3. *The family as the main provider of intergenerational solidarity*

In all human societies, families practice intergenerational solidarity. Indeed, this practice is highly praised in the social teaching of the Church. According to *Gaudium et spes*, “The family, in which the various generations come together and help one another grow wiser and harmonize personal rights with the other requirements of social life, is the foundation of society” (52). The route by which to enter the key and substantial parts of our subject is thus clear and precise. We cannot seek here to survey the whole of the Social Doctrine as it applies to the family – that would go beyond the confines of this essay. It would be possible in particular to show how social sciences contribute to supporting the vision of the Magisterium about the shadows that afflict the family in the present world and about the resulting evils. Instead we must focus on our specific subject and examine how the Doctrine is led to deal with intergenerational solidarity.

Let us refer to the Apostolic exhortation *Familiaris consortio* of John Paul II (November 1981). We see that our subject is examined in the third part, “The role of the Christian family”, after “Bright spots and shadows for the family today” and “The Plan of God for marriage and the family”, and before the last part “Pastoral care of the family: stages, structures, agents and situations”. In this third part let us first consider the sub-part “III.

³*Sollicitudo rei socialis*, n. 38. These sentences were written for the context of solidarity between more or less developed nations. But they perfectly apply to that of solidarity between generations.

Participating in the development of society”, setting aside for our two following sections sub-part “II. Serving life”.

The family, states the apostolic text, is “the first and vital cell of society” (42). Let us note from the outset that this quotation explicitly refers to the family as a “conjugal community”. Many other passages speak of the father, the mother and the children. Thus reference is mostly made to the “family nucleus”. Of course the exhortation also recognizes the value of the concept of the extended family. It writes: “conjugal communion constitutes the foundation on which is built the broader communion of the family, of parents and children, of brothers and sisters with each other, of relatives and other members of the household” (21).

Does the apostolic text deliberately avoid mentioning the solidarity between remote generations of the same family lineage, bound by norms internal to the lineage, by the genetic heritage, by wealth and by behavioural traditions (according to which concerns for outsiders are more or less valued)? Should not this dimension be examined in a part entitled “The role of the Christian family”? What could the Academy propose on this point?

The nature of solidarity within the family is spelled out concisely but with perfect clarity: “The relationships between the members of the family community are inspired and guided by the law of ‘free giving’. By respecting and fostering personal dignity in each and every one as the only basis for value, this free giving takes the form of heartfelt acceptance, encounter and dialogue, disinterested availability, generous service and deep solidarity. Thus the fostering of authentic and mature communion between persons within the family is the first and irreplaceable school of social life. ... In this manner ... the family forms the most efficient cradle of humanization and personalization of society” (43).

Lastly, the family must be open to social solidarity: “Families therefore, either singly or in association, can and should devote themselves to manifold social service activities, especially in favor of the poor, or at any rate for the benefit of all people and situations that cannot be reached by the public authorities’ welfare organization. In a special way the Christian family is called to listen to the Apostle’s recommendation: ‘Practice hospitality’ (*Rm* 12, 13)” (44).

4. *Procreation*

The demography of future generations will matter for them. This, of course, depends on the birthrate of present generations. How do the latter

interpret their solidarity duty in this respect? At least since the writings of Thomas Malthus (1766-1834) and with particularly acute force during the second half of the XXth century, this question often opposed the teaching of the Catholic Church to intellectual trends which were less confident about divine solicitude for mankind and more worried about demographic perspectives. This note is meant to present the Social Doctrine of the Church. However, it will not totally ignore the changing diagnoses drawn in the past from demographic projections. It will recall the choice of the Church for life, before turning attention, first, to the duties of the husband and wife, prior to those of public authorities.

“The Church firmly believes that human life, even if weak and suffering, is always a splendid gift of God’s goodness. Against the pessimism and selfishness which cast a shadow over the world, the Church stands for life: in each human life she sees the splendor of that “Yes”, that “Amen”, who is Christ Himself. To the “No” which assails and afflicts the world, she replies with this living “Yes”, thus defending the human person and the world from all who plot against and harm life” (Apostolical exhortation of John Paul II, *Familiaris consortio*, 30).

On these grounds our colleague, Michel Schooyans, established a disturbing diagnosis of the present situation. I am quoting him, translating from the French: “Why do women have fewer children? Why is the population growth rate decreasing? Why is the population aging? These phenomena are observed practically everywhere in the world. In some places, such as Europe, they have the features of a *crash*. ... Applied to population, the word *crash* calls to mind the *rapid fall* in fertility and natality. The very clear decline of these indicators is a fairly new phenomenon. It is explained mostly by increasingly numerous interventions designed to control the transmission of life. The demographic decline assumes the form of a downfall, of a wreck: if man tends to disappear, what is the future for the world? Why this decline? Why this collapse? What consequences will follow?” (*Le crash démographique. De la fatalité à l’espérance*, Paris, Fayard, 1999, pp. 7-8). Although beyond the subject of this note and at times disputed, this diagnosis should not be neglected.

In 1965 *Gaudium et spes* stressed the duties of husbands and wives in the following words: “Parents should regard as their proper mission the task of transmitting human life and educating those to whom it has been transmitted. They should realize that they are thereby cooperators with the love of God the Creator, and are, so to speak, the interpreters of that love. Thus they will fulfil their task with human and Christian responsibility,

and, with docile reverence toward God, will make decisions by common counsel and effort. Let them thoughtfully take into account both their own welfare and that of their children, those already born and those which the future may bring. For this accounting they need to reckon with both the material and the spiritual conditions of the times as well as of their state in life. Finally, they should consult the interests of the family group, of temporal society, and of the Church herself. The parents themselves and no one else should ultimately make this judgment in the sight of God” (50).

This formulation was confirmed in 1980 by *Familiaris consortio*, which, quoting the Synod of Bishops held shortly before its publication, states: “This Sacred Synod, gathered together with the Successor of Peter in the unity of faith, firmly holds what has been set forth in the Second Vatican Council (cf. *Gaudium et spes*, 50) and afterwards in the encyclical *Humanae vitae*, particularly that love between husband and wife must be fully human, exclusive and open to new life (*Humanae vitae*, 11; cf. 9, 12)” (29).

The fact that a husband and wife are fully and exclusively responsible for giving life is stressed as follows in the same exhortation: “Thus the Church condemns as a grave offense against human dignity and justice all those activities of governments or other public authorities which attempt to limit in any way the freedom of couples in deciding about children. Consequently, any violence applied by such authorities in favor of contraception or, still worse, of sterilization and procured abortion, must be altogether condemned and forcefully rejected. Likewise to be denounced as gravely unjust are cases where, in international relations, economic help given for the advancement of peoples is made conditional on programs of contraception, sterilization and procured abortion” (30).

5. Education

The Social Doctrine seems to be quite complete about education in the family but almost silent about other institutions, which are in charge of teaching or contribute (positively or negatively) to education. However, future generations will benefit or suffer from what they will have received or not from these other institutions, which are playing an increasing role. As regards family education, here are the main points of the Doctrine, taken from the encyclical *Familiaris consortio*.

Parents bring their sons and daughters into life. “Hence, parents must be acknowledged as the first and foremost educators of their children. Their role as educators is so decisive that scarcely anything can compensate for their fail-

ure in it. For it devolves on parents to create a family atmosphere so animated with love and reverence for God and others that a well-rounded personal and social development will be fostered among the children. Hence, the family is the first school of those social virtues which every society needs" (36).

"Even amid the difficulties of the work of education, difficulties which are often greater today, parents must trustingly and courageously train their children in the essential values of human life. Children must grow up with a correct attitude of freedom with regard to material goods, by adopting a simple and austere life style and being fully convinced that "man is more precious for what he is than for what he has" (37).

"Children must be enriched not only with a sense of true justice, which alone leads to respect for the personal dignity of each individual, but also and more powerfully by a sense of true love, understood as sincere solicitude and disinterested service with regard to others, especially the poorest and those in most need" (37).

"Education in love as self-giving is also the indispensable premise for parents called to give their children a clear and delicate sex education. ... Sex education, which is a basic right and duty of parents, must always be carried out under their attentive guidance, whether at home or in educational centers chosen and controlled by them" (37).

"The mission to educate demands that Christian parents should present to their children all the topics that are necessary for the gradual maturing of their personality from a Christian and ecclesial point of view" (39).

"The family is the primary but not the only and exclusive educating community. Man's community aspect itself – both civil and ecclesial – demands and leads to a broader and more articulated activity resulting from well-ordered collaboration between the various agents of education. All these agents are necessary, even though each can and should play its part in accordance with the special competence and contribution proper to itself. ... But corresponding to their right, parents have a serious duty to commit themselves totally to a cordial and active relationship with the teachers and the school authorities" (40).

6. *Teenagers and young adults*

They still have much to receive from the older generations. Depending on what they receive, they will be more or less able to pass on what is valuable to younger generations. Moreover, many of these teenagers and young people are suffering from the disorders of our modern societies. In addition

to parents, society itself has duties to them. I am therefore surprised to see that their case is so little mentioned in the texts of the Magisterium.

On two occasions the Holy Father has referred to the problem in his messages for the World Youth Days. In November 1991, announcing the theme of the VIIth Day (*Go into the whole world and proclaim the Gospel*), the Pope wrote: "Everyone knows the problems which plague the environment in which young people live: the collapse of values, doubt, consumerism, drugs, crime, eroticism, etc. But at the same time every young person has a great thirst for God, even if at times this thirst is hidden behind an attitude of indifference or even hostility". In August 1992, announcing the theme of the VIIIth Day (*I came that they might have life, and have it to the full*), he wrote: "Human existence has its moments of crisis and weariness, despondency and gloom. Such a sense of dissatisfaction is clearly reflected in much of today's literature and films. In the light of this distress, it is easier to understand the particular difficulties of adolescents and young people stepping out with uncertainty to encounter all the fascinating promises and dark uncertainties which are part of life. ... There are false prophets and false teachers of how to live. First of all there are all those who teach people to leave the body, time and space in order to be able to enter into what they call 'true life'. ... Seemingly at the other extreme, there are the teachers of the 'fleeting moment', who invite people to give free rein to every instinctive urge or longing, with the result that individuals fall prey to a sense of anguish and anxiety leading them to seek refuge in false, artificial paradises, such as that of drugs. There are also those who teach that the meaning of life lies solely in the quest for success, the accumulation of wealth, the development of personal abilities, without regard for the needs of others or respect for values, at times not even for the fundamental value of life itself".

The substance of these extracts does not seem to have been further elaborated. Indeed, young people themselves have hardly any responsibility in the bad features of the human environment in which they grow up. The papal messages in question aim rather to strengthen youngsters in their faith. A link, of course, exists between these extracts and the subject of section 9 below. But should not the Magisterium stigmatize more fully the neglect of important duties of which many parents, educators, teachers, writers, or people working for the press or the world of entertainment are guilty? For want of being able to do better, I shall just suggest that the issue should be seriously studied by the Academy.

A substantial literature certainly exists in the social sciences on the problems experienced by teenagers and young adults. A part of this literature is certainly relevant for our subject. I happen to know that Professor Eugenia Scabini, who teaches social psychology at the Catholic University of Milan, has devoted a large part of her research during the last decade to the set of topics that I just discussed. She could probably advise us.

7. *Care of the elderly*

The teaching of the Church speaks of the elderly in their relations with their families but hardly at all of income redistribution in their favour. Speaking below of the human environment we shall see that the welfare state was referred to in *Centesimus annus* only in Chapter V, where it is recognized as having “responded better to many needs and demands”, but where “excesses and abuses” are also mentioned. *Laborem exercens* seems to contain just one sentence in this respect, at the end of section 19, when a list of the social benefits to which workers are entitled is given: “the right to a pension and to insurance for old age and in case of accidents of work”. Should not the Church be explicit about the duties of the “indirect employer” in countries where social transfers are still scanty? Should she not be prepared to take a stand on the choices that will have to be made in Europe about the respective welfare of adults and of old people, when accelerated ageing of the population will impose some sacrifice on one or the other?

Section 27 of *Familiaris consortio* addresses the problem of the elderly in their families. First, one should observe that: “There are cultures which manifest a unique veneration and great love for the elderly ... They continue to be present and to take an active and responsible part in family life ... They carry out the important mission of being a witness to the past and a source of wisdom for the young and for the future. Other cultures, however, especially in the wake of disordered industrial and urban development, have both in the past and in the present set the elderly aside in unacceptable ways”.

The encyclical then declares that “the pastoral activity of the Church must help everyone to discover and to make good use of the role of the elderly within the civil and ecclesial community, in particular within the family”. It further quotes a speech by the Holy Father to the participants at the “International Forum of Active Aging” (5 September 1980, n. 5): “The life of the elderly ... is a marvellous proof of the interdependence of the people of God. Old persons often possess the charisma to fill in the

generation gaps before they are created. ... How many among them have eagerly endorsed these divine words: "The crown of grand-parents is their grand-children" (*Pr* 17, 6)!".

8. *Solidarity towards future generations – the physical environment*

Centesimus annus (37) wanted to express the concern that the Church shares these days with many of our contemporaries about ecological questions. In order to address them the Church locates her diagnosis in her teaching on creation. "Man, who discovers his capacity to transform and in a certain sense create the world through his own work, forgets that this is always based on God's prior and original gift of the things that are. In this regard, humanity today must be conscious of its duties and obligations towards future generations". Let us look more precisely at these teachings.

Genesis announces not only that nature was the result of divine action but also that man is the preferred agent of God for carrying forward creation (*Gn* 1, 26-31). It would be out of place to trace here the long history of human action in the transformation of nature. We shall rather acknowledge that acceleration in scientific and technical progress in modern times has made us overly confident about our capabilities and overly greedy, up to the point of making us seriously shortsighted.

"Man thinks that he can make arbitrary use of the earth, subjecting it without restraint to his will, as though it did not have its own requisites and a prior God-given purpose, which man can indeed develop but must not betray. Instead of carrying out his role as a co-operator with God in the work of creation, man sets himself up in place of God and thus ends up provoking a rebellion on the part of nature, which is more tyrannized than governed by him" (*CA* 37).

This aberration appears in particular when we consider changes in consumption habits, in relation to which the teaching of the Church has other reasons to be concerned: "A direct appeal is made to [man's] instincts – while ignoring in various ways the reality of the person as intelligent and free – then *consumer attitudes* and *life-styles* can be created which are objectively improper and often damaging to his physical and spiritual health" (36). And, as regards our present subject: "In his desire to have and to enjoy rather than to be and to grow, man consumes the resources of the earth and his own life in an excessive and disordered way" (37). Indeed, it is more and more clear that "natural resources are limited; some are not, as it is said, renewable. Using them as if they were inexhaustible, with absolute domin-

ion, seriously endangers their availability not only for the present generation but above all for generations to come" (*SRS* 34).

In addressing the ecological question, which duties should Christians feel bound to embrace? First, everybody should question their own behaviour and adopt a correct attitude: "that disinterested, unselfish and aesthetic attitude that is born of wonder in the presence of being and of the beauty which enables one to see in visible things the message of the invisible God who created them" (37).

The Church, moreover, asserts the principles which should underlie the pursuit of the *common good*. She has done this mostly when dealing with international questions – interdependence between nations appearing more and more in the most significant problems involved. She did this particularly in the encyclical *Sollicitudo rei socialis*, where environmental questions appear as subsidiaries to those involving development. Section 35 states: "when the scientific and technical resources are available which, with the necessary concrete political decisions, ought to help lead peoples to true development, the main obstacles to development will be overcome only by means of essentially moral decisions". Section 38 adds: "On the path toward the desired conversion, toward the overcoming of the moral obstacles to development, it is already possible to point to the positive and moral value of the growing awareness of interdependence among individuals and nations. ... It is above all a question of interdependence, sensed as a system determining relationships in the contemporary world ... accepted as a moral category. When interdependence becomes recognized in this way, the correlative response as a moral and social attitude, as a "virtue", is solidarity. ... It is a firm and persevering determination to commit oneself to the common good; that is to say to the good of all and of each individual, because we are all really responsible for all".

Our Academy might, I believe, consider whether it might not introduce elements which could make the teaching of the Church more precise in relation to the choice of environmental policies, whether local, national or international. I mean those policies which, by their positive intervention or their neglect, will most affect the fate of future generations. Which "scientific and technical resources are available which ... ought to help lead people to" live in a satisfactory environment? And thanks to which "necessary concrete political decisions"?

Signs suggest that the Church would see no difficulty in explicitly placing this search in the continuation of some principles which are fair-

ly generally accepted today. Thus Father René Coste⁴ brings out eight principles which, according to him, should serve as “landmarks for an ethics of ecology (within the framework of the ethics of creation)” (pages 506 to 511). I quote in particular *ethics of the future* formulated as follows: “If we want that tomorrow will not always be already too late, anticipation must prevail over adaptation, the ethics of the future must get the better of the tyranny of urgency”. Likewise, he proposes the acceptance of two principles stated in the Declaration of the United Nations Conference on the Environment and Development (Rio, June 1994). The *principle of precaution* stipulates that in case of a risk of serious or irreversible damages the lack of absolute scientific certainty should not serve as a pretext for delaying effective measures aimed at preventing environment degradation (we might hesitate about the question of whether the principle should not rather say “in case of risk of serious *and* irreversible damages”). The *polluter-payer principle* stipulates that the polluter must, in principle, bear the cost of the pollution, with a concern for the public interest and without distorting international trade and investment (the meaning and intent of the last clause might be discussed).

9. *Solidarity towards future generations – the social environment*

Immediately after the paragraphs on ecology, *Centesimus annus* (38) stresses the importance of the social environment. “In addition to the irrational destruction of the natural environment, we must also mention the more serious destruction of the *human environment*, something which is by no means receiving the attention it deserves. ... Man is also conditioned by the social structure in which he lives, by the education he has received and by his environment. These elements can either help or hinder his living in accordance with the truth. The decisions which create a human environment can give rise to specific structures of sin which impede the full realization of those who are in any way oppressed by them. To destroy such structures and replace them with more authentic forms of living in community is a task which demands courage and patience”. Clearly the objective is a matter for intergenerational solidarity. Without repeating what was earlier said of the questions concerning the family, to which the encyclical directly turns, we shall consider here other teachings of the Church, which also bear on the slow construction of the social environment.

⁴*Les dimensions sociales de la foi*, Editions du Cerf, Paris, 2000.

Gaudium et spes well defined the objective to be assigned to this construction. Section 63 states: "Man is the source, the center, and the purpose of all economic and social life". Section 64 specifies: "Economic activity is to be carried on according to its own methods and laws within the limits of the moral order, so that God's plan for mankind may be realized". Section 65 adds: "Economic development must remain under man's determination and must not be left to the judgment of a few men or groups possessing too much economic power or of the political community alone. ... Citizens, on the other hand, should remember that it is their right and duty, which is also to be recognized by the civil authority, to contribute to the true progress of their own community according to their ability". Section 66 further specifies: "To satisfy the demands of justice and equity ... an end must be put to the tremendous economico-social disparities".

In 1965 this objective already appeared rather demanding. Many in 2002 find it even more demanding. Hence the unescapable question: in what way are the economic and social structures of this world responsible for the fact that our societies find it so difficult to move toward an objective to which so many women and men seem to adhere? And this question was already posed before *Rerum novarum*. Fifty years ago a fairly large consensus prevailed in favour of structures which, while leaving ample room to the market economy, also gave important social responsibilities to the state. Those were the days of the construction of the welfare state, whose adequacy is today often questioned, at least as regards its methods. What is now the social doctrine of the Church on this issue?

Again, *Centesimus annus* provides the most embracing and recent formulation. I am not going to follow it closely here but rather to recall its main propositions. So doing I shall best exhibit the tensions between the terms of which decisions have to be taken by those who want to apply the Social Doctrine. Indeed, it is precisely in relation to these tensions that the elements brought by our disciplines could be most useful to the Church. Our attention must be geared mainly toward chapter IV, dealing with private property and the universal destination of goods, and chapter V, on the state and the culture.

Sections 30 to 35 mainly recall the principles set out in *Rerum novarum* about the natural character of the right to private property, subject, however, to the constraint of having regard for the common destination of goods ("God gave the earth to the whole human race for the sustenance of all its members, without excluding or favouring anyone" 31). These sections add two meaningful complements. The first emphasizes the value of the entre-

preneurial spirit and states that “the modern *business economy* has positive aspects” (32), but also points out “the risks and problems connected with this kind of process” with in particular new forms of inhuman exploitation (33). Secondly, the text later states: “Profit is a regulator of the life of a business, but it is not the only one; *other human and moral factors* must also be considered which, in the long term, are at least equally important for the life of a business” (35).

Section 42 takes a stand on capitalism. It poses the question: “Can it perhaps be said that capitalism is the victorious social system? ... Is this the model which ought to be proposed?” To which the answer is: “If by ‘capitalism’ is meant an economic system which recognizes the fundamental and positive role of business, the market, private property and the resulting responsibility for the means of production, as well as free human creativity in the economic sector, then the answer is certainly in the affirmative. ... But if by ‘capitalism’ is meant a system in which freedom in the economic sector is not circumscribed within a strong juridical framework which places it at the service of human freedom in its totality, and which sees it as a particular aspect of that freedom, the core of which is ethical and religious, then the reply is certainly negative”.

After section 40, which states “It is the task of the State to provide for the defence and preservation of common goods such as the natural and human environments, which cannot be safeguarded simply by market forces”, section 48 considers the role of the state in the economic sector: “Economic activity, especially the activity of a market economy, cannot be conducted in an institutional, juridical or political vacuum. ... The State has the further right to intervene when particular monopolies create delays or obstacles to development. ... In recent years the range of such interventions has vastly expanded, to the point of creating a new type of State, the so-called ‘Welfare State’. This has happened in some countries in order to respond better to many needs and demands, by remedying forms of poverty and deprivation unworthy of the human person. However, excesses and abuses, especially in recent years, have provoked very harsh criticisms of the Welfare State, dubbed the ‘Social Assistance State’”. The following texts in the encyclical partly accepts this criticism.

“The Church values the democratic system. ... Authentic democracy is possible only in a State ruled by law, and on the basis of a correct conception of the human person” (46). “The Church respects *the legitimate autonomy of the democratic order* and is not entitled to express preferences for this or that institutional or constitutional solution. Her contribution to the

political order is precisely her vision of the dignity of the person revealed in all its fullness in the mystery of the Incarnate Word” (47).

Lastly, the social environment will depend on the culture that we pass on to future generations. Will we have contributed to valuing and enriching all the cultural wealth that we have received? Asking the question suffices to reveal its importance. *Centesimus annus* reminds us of this: “All human activity takes place within a culture and interacts with culture. For an adequate formation of a culture, the involvement of the whole man is required. ... Thus the first and most important task is accomplished within man’s heart. The way in which he is involved in building his own future depends on the understanding he has of himself and of his own destiny. It is on this level that *the Church’s specific and decisive contribution to true culture* is to be found. ... The Church renders this service to human society *by preaching the truth about the creation of the world*, which God has placed in human hands so that people may make it fruitful and more perfect through their work; and *by preaching the truth about the Redemption*, whereby the Son of God has saved mankind and at the same time has united all people, making them responsible for one another” (51). “For [peace] to happen, *a great effort must be made to enhance mutual understanding and knowledge, and to increase the sensitivity of consciences*. ... The poor – be they individuals or nations – need to be provided with realistic opportunities. Creating such conditions calls for a *concerted worldwide effort to promote development*, an effort which also involves sacrificing the positions of income and of power enjoyed by the more developed economies” (52).

PART II

A SOCIOLOGICAL ASSESSMENT

“INTER-GENERATIONAL SOLIDARITY”: A SOCIOLOGICAL AND SOCIAL POLICY ISSUE

PIERPAOLO DONATI

1. INTER-GENERATIONAL RELATIONS AS A GLOBAL CHALLENGE

1.1. *The inter-generational challenge*

At the beginning of the XXIst century, in many countries all over the world, families and children have come to face new dilemmas related to the lack of inter-generational solidarity and equity. While many old issues (such as family poverty, multi-problem families, etc.) persist, a new scenario of difficulties has appeared: the ceaseless *worsening of generational relations*. In what does this scenario consist?

“Generational issues” is a broad label under which it is common to subsume many interconnected social problems in the relations among generations. In what ways are they different today from in the past? Let me summarize them briefly:

- *families are less and less committed to having children* to an extent that overshadows the demographic transition from a traditional to a modern society; today, in some countries (e.g. Europe) even the model of the typical nuclear family with two children is at stake;

- owing to the socio-demographic shifts, more and more resources (in terms of social protection expenses) are devoted to older generations, while *shares available to children are in danger*; the present patterns of social expenditures among different age groups are confronted with a *vicious circle syndrome*: the more they give to the older, the less they leave to the younger;

- *the fraction of the national income distributed to households with children, and thus the fraction of that income available for the raising of children, has declined quickly* as the percentage of households with no children increases;

– *the cultural transmission from one generation to the other is losing ground*; children and youth are increasingly isolated from the adults who constitute their principal socializing agents; primary social ties become more and more problematic in everyday life; families split up and are dispersed; children are confronted with a more dangerous social environment since risks of isolation, neglect, poverty, and even abuse are multiplied;

– national welfare states have set up many educational, social and health schemes for children, but at the same time it has become even more apparent that collective welfare arrangements, besides not being able to substitute the family, quite often do not work properly in favour of better exchanges between generations; in other words, *social welfare systems have shown themselves as lacking a real orientation to the links between generations*.

Put bluntly, in many countries it becomes apparent that children and younger generations appear as *victims* of adults and older generations under many social, economic, and cultural respects.

1.2. *A new stage*

It is not my task to analyse the above mentioned phenomena in detail here. I take them for granted. My aim is to suggest that we should have a careful look at what is happening between and within generations in the different countries taking into account the relations between families and governments.

In order to understand the historical discontinuities I am referring to, we can recollect that, generally speaking, the relations between families and governments have followed two typical *patterns* or *stages*.

a. In the first half of the twentieth century, national welfare states *used to address families and children mainly in terms of social control*: families were granted economic, legal and material provisions in exchange for men's control over women and children. *Family rights embodied individual rights* so that people (in particular children) suffered from bonds which were too compelling. Children's rights were greatly restricted: they were almost completely subsumed under the family coverage. In case of family failure, total institutions were delegated to pick up the children.

b. Since the second world war, national welfare states have, in a sense, reversed the previous pattern: they have acknowledged an increasing number of social rights and provisions for individuals and social categories (in particular women, handicapped people, old people, and children), but have left the family apart. The rights of the family as a social group and institu-

tion have been undermined in many respects. In a certain sense, *the family has lost its citizenship*. The overall outcome has been the decline of fertility and the creation of a social environment unfavourable to the reception of the newly born (be it a direct or an indirect effect).

The evaluation of the positive and negative outcomes of these policies cannot be elaborated here, both because I have not enough room here and because this subject is already well documented (e.g. Dumon ed., 1989).

c. Nowadays many countries (particularly western countries) are entering a stage (or pattern) which is very different from the previous ones under many aspects.

On the one hand, the new trends contradict the old pattern (which used to be dominant until the end of the XX century) in so far as the family cannot be considered and handled as a social control agency which acts on behalf of the state: the family has acquired an increasing autonomy (*autopoiesis*) and is oriented towards managing its generational problems even more privately.

On the other hand, the new trends must differ from the old patterns in so far as it becomes clear that the multiplication of individual rights is only a partial solution. If we want to have a social environment which is more sensitive to children's needs, then we must give proper *consideration to the repercussions that the lack of social support for families has on children*.

1.3. In the perspective of the development of citizenship rights, the new issues revolve around the need for a better *compatibility between individual and family rights*: both kinds of entitlements must be secured, and the pursuit of this target should be done in such a way as to foster relations of social solidarity and equity between generations. If societies really want to pursue this goal, then families should become valid interlocutors of societal institutions and governments, at every level (regional, national, and supranational). This is, I believe, our topic. From the point of view of the development of families and children rights, the last decade has been one of lost opportunities. But, at the same time, it has been fruitful, since a new "generational" awareness has arisen and grown up.

1.4. This paper is divided into two parts. In the first part, I intend to sketch a profile of the main social needs of families and children emerging all over the world today in terms of intergenerational issues (pr. 2, 3).

The argument is that sociological research must recognize that families are a sub-system of society. In the second part, I argue that family needs can and should be solved with reference to the issue of “intergenerational solidarity (or equity)”, which has to be defined accurately (pr. 4, 5). In the conclusions (pr. 6), I contend that the present agenda and strategies of nation-States are not well suited to confront the issue of intergenerational equity, and I make some suggestions about the ways to overcome these deficiencies.

2. WHERE IS THE FAMILY GOING? EMERGING SOCIAL NEEDS OF FAMILIES AND CHILDREN AND THE UNDERTAKING OF POLITICAL REPLIES

2.1. *What do families need?*

It is of course impossible to synthesize here the very many empirical surveys and statistical research projects done on this broad subject matter (some of the most recent reports are listed in the final bibliography: Chouraqui, 1986; EEC Documents; Cornia ed., 1992; Donati & Matteini eds., 1991; Dumon, 1990; Moss, 1988; Oepfn, 1990; Qvortrup *et al.*, 1991). What I can say, without going into detail here, is that societal changes occurring throughout the world are deeply affecting family structures and children conditions along with the following main trends:

- families go on *splitting up* (increasing the number of singles and one-parent families);
- families show a *decreasing average size* (mainly due to the decline in the birth rate);
- families are *ageing* (rise in the average age of households);
- families display worrying *signs of psycho-social pathologies*, both within the couple (separation and divorces) and towards children (violence, abuse, maltreatment, abandonment);
- families stick to a cultural process of *privatisation in their choices, feelings, and expectations*, so that narcissistic and selfish orientations prevail on behaviours of internal solidarity and civic participation;
- the continuing existence of *poor families* is also striking; we can distinguish them into *poor working families* (low income strata) and *underclass families* (stemming from unemployment, lack of professional training -e.g. unskilled women-, irregular immigration and other factors excluding people from the regular labour market); but what is more

important is to observe that *poverty is generally associated with particular family structures* (such as one parent families and large families with many children).

By putting the emphasis on these trends I do not mean to claim that there have been no social advancements and no positive achievements. As a matter of fact a general and remarkable improvement of material living conditions has taken place in most countries in the last few decades. What I want to stress and thematise here is something which can be expressed in the form of the following questions: is the above depicted picture satisfactory in order to understand the deeper meaning of present changes? is this picture a plausible basis for a reliable sociological understanding of the situation and for a sound social policy?

On balance, I am afraid, the answers to these questions are negative.

If one sticks with the above sketched portrait of the social conditions of families, then the list of needs becomes only an endless *cahier de doléances* which refer to:

– socially *weak* families (e.g. one parent families; families below the poverty line; underclass families with handicapped children, with unemployed or unskilled members, especially women; immigrant, socially isolated or non integrated families);

– and *pathological* families (e.g. severely ill, educationally inadequate or abusing families),

where children are stigmatised or are exposed to a wide range of risks.

If policies follow the logic of addressing single issues, they end up by formulating a long list of needs and priorities in which the family almost disappears, or at least is reduced only to a problematic object. This has been the dominant pattern followed until today.

The main shortcoming of this approach lies in the fact that the needs of families and children are formulated in a disconnected and patchy way. So are the replies, in terms of policies. One cannot clearly see the links between different wants and different persons as a malfunction in the exchanges between generations.

The descriptive approach I am referring to tells us only that, on the whole, societal changes have created deep imbalances among generations. It ends up by saying that many families find themselves in such a situation that they cannot deal with issues of generational solidarity and equity through the private sphere alone. This is of course true, but it is only one side of the coin. The other side says that families and societies have to mobilise in order to solve their problems.

The question: “what do families need?” should be given a reply which is very simple and extremely complex at the same time: *families need to be fully recognised as families.*

This perspective leads us to new observations. In particular it suggests that:

- (i) the living conditions of families depend on the complex of exchanges among generations: as we know that there are social bonds between genders that penalise women, so it is also now apparent that *there are bonds between generations that penalise those who have children in respect to childless people;*

- (ii) *our society cannot discharge the filial debt* (the aid of younger people to the older) *on generations that are not generated;* if the replacement of the population should go on at the depressed levels which have occurred in the last two decades, around the middle of the next century only a few social security systems will be able to assure a fairly good income level for the older generations;

- (iii) the social needs of families and children should be given new attention not only from the material point of view (lack of income, lodging, health) but especially from the *relational point of view.* The social needs of children cannot be managed either within the family *alone* nor by addressing them as a social category *per se:* they must be met by looking at the adequacy of the relationships between children and their everyday social environment. Welfare systems must operate on the network of social ties in which children live rather than on individuals.

If we want to have a more integrated and global picture of the issues at stake, we must consider the fact that *most of the social problems arise when families do not perform their tasks as mediating structures linking together needs and persons in a proper way.* This is the *core issue* at stake. *One is led to the idea that it could be more productive to look at present social problems through a re-interpretation of family functions, and that such a perspective could also be more equitable and effective from the point of view of practical solutions,* provided that families are helped by society to help themselves.

But is there something like “the family”? Is it not true that the family is seriously in crisis and that in many areas it is almost disappearing?

As a matter of fact the trends described above are, as a rule, decoded in that way. The most diffuse interpretations of the family condition all over the world quite often reveal two basic biases.

I. First, they contain an *evolutionist* reading of the family, as if it were bound to disappear, which is at least dubious (Lévi-Strauss, 1983).

II. Second, they *reduce the family life cycle to the life course approach*, treating families only as a provisional set of contingent individual careers, which is also an improper operation (Aldous, 1990). Of course the life span approach is a useful tool for looking at the dynamics of households, but it cannot substitute the *family life cycle* perspective.

2.2. *After the crisis of the family*

At this point, it becomes clear that we cannot give a significant answer to the issue of families' and children's needs unless we have a more precise idea of where the family is going.

Most literature on the so-called "crisis of the family" has made serious mistakes or has incurred plain misunderstandings: on the one hand it has overestimated the crisis, on the other hand it has underestimated it. The last decades have demonstrated that neither the theories asserting the "death of the family" nor the theories supporting the view of a supposed dominance of the "nuclear family model" have proved right. Neither theory fits empirical reality, nor are they useful for social policies.

Today it should be more evident than yesterday that the family has indeed faced a deep crisis, but this crisis must be interpreted adequately. Family changes have certainly been radical, but not in the sense that the family is going to disappear or lose its most relevant social functions. On the contrary, the family has proved to be an *active subject*: under many respects it is still a "latent" actor of society in so far as it precedes and exceeds it, i.e. "goes beyond it".

Extrapolating the current phenomena within and around the family as if they were to move forward in a linear way over time could be not only wrong but also damaging. As Roussel rightly points out, if the "uncertain" family of the present age should become the dominant type, and if the family should therefore give up its institutional dimensions, then for the new generations there shall remain nothing more than a mere incitement to egotistical desires or to overt violence (Roussel, 1989).

From this angle, it becomes more and more urgent to re-read the meaning of family changes not only in a socio-cultural perspective (as a question of fashion, opinions, psychological feelings), but also as a *social and political issue*. The family must again and again be interpreted as a difference which makes a difference: in what ways is a family different from other social relationships and in what ways this difference is relevant today in comparison with the past?

If we place ourselves in such a perspective, the distinction between familiar/non-familiar becomes more and more, not less and less, relevant and meaningful: to have a family or not, to have a family which is competent or malfunctioning, to have a family with a certain living style or another, all these factors become more and more determinant in the life of children. *The family as a social relation* discloses itself as increasingly discriminating in respect to non-family relations.

Why, then, have many come to believe that just the opposite is true? The fact is that the family is exposed to a (seeming) paradox: it becomes less relevant and more relevant at the same time. This happens, of course, in different domains: the family becomes less important from the point of view of social order and control (it loses ground particularly in its relationships with the political-administrative system), while it increases its importance in the sphere of daily informal relations, particularly those which concern the health of children and their primary socialization.

If we adopt this perspective, it becomes clearer how and why governments have treated the family in an ambiguous way. For instance: many national reforms appeal to the family as a socializing agency of minors who are deviant or drop out, just when the family displays its deep difficulties in the education of children. The fact is that in order to understand these paradoxes we must avoid thinking of the family either in traditional terms or in terms of sheer subjective feelings.

These considerations do not lead us to an easy evaluation of the crisis of the family. Where is the family going? For a plausible answer, I believe, we are led to a perspective according to which we are witnessing a *qualitative change (morphogenesis) in the forms of the family* as a social group and as a social institution at the same time. In what does this morphogenesis consist?

Briefly, I would like to describe it as follows.

2.3. *How families change*

The new needs of families and children must be spelled out and coped with in the context of two fundamental tendencies, which are ambivalent in themselves: (a) on the one hand they ask for more freedom, (b) on the other hand they need new regulations for the common good. Let us look at the two sides of the coin.

a) On the one hand the family is inclined to constitute itself on the grounds of more and more autonomous and individualised behaviours. As a social *group* the family is made up of people who are holders of individ-

ual rights (it can be called the "*auto-poietic family*"). This means that families tend to become normative for themselves; they tend to create their own structures by themselves. Seemingly this occurs on the basis of very individualistic behaviours. One says: the family becomes an interlacing of highly contingent individual life courses. In reality it is a new social order which emerges. Within it the family is at the same time looked for (as a sphere of humanization) and repressed (as a sphere of solidarity). The family, now conceived as a mere household, demands more autonomy from society, but if such autonomy does not encounter reasonable forms of co-ordination and social regulation it runs the risk of converting into isolation, breakdowns, and/or emargination of people.

b) On the other hand, the family activates new social demands which become a basic referral for welfare policies. From this point of view families manifest the exigency of assuming a new *institutional* role. They ask for many interventions which concretely regard:

- the need, for the couple, to live freely their fertility behaviours: they discover that our society limits the freedom of procreation only downward, i.e. only in a restrictive sense;
- the need to harmonise family life and work, and to solve this difficult issue through a legal, economic, and social equality between the sexes;
- the need for more social protection of socially weak people living in the family, as a consequence both of conjugal breakdowns and of critical events (illness, handicap, etc.);
- the need to reconcile family life and social services, leisure time, and civic participation (the schedule of shops, social facilities, schools for children, TV programs, and so on);
- the need for a fiscal treatment which can be equitable on the part of the state, and be arranged so as not to penalise those who willingly assume more responsibilities in favour of rearing children, and taking care of old and handicapped people;
- the need to strive against poverty without stigmatising the family itself, or its individual members;
- the need for welfare interventions which can take into full consideration the quanti-qualitative structure of family wants;
- the need for more support for those families who engage in enterprises of mutual help, self-help, volunteering, and cooperation, especially in the field of personal social services: this relates to the topic of the role of the family in community care;
- the need to have political representation in order to promote the rights of families as consumers and clients.

At the heart of all these new needs we find the fact that social policies have not addressed properly families' and children's conditions in so far as welfare policies:

- have stockpiled individual rights without upholding the family system as a solidarity network for the support of the person, as it is in reality (Dumon in Shamgar & Palomba eds., 1987);
- social security systems have not been designed according to the family life cycle (Gilliand, 1988);
- welfare expenditures do not take into account the need for a "logic of compatibility" between generations: generally speaking, they have devoted too much to the elderly and too little to children (Pampel & Stryker, 1990; Preston, 1984; Sgritta, 1991).

In synthesis: all over the world, on the one hand civil society has created a deep lack of continuity and even breaks among generations, and on the other hand both global markets (globalization processes) and public welfare policies have complied with these trends rather than trying to balance their inherent contradictions.

The main issue concerns the pursuit of a new, dynamic equilibrium between families and the other spheres of society (work; school; leisure; civic activities) taking into account the "generational variable". We need a new dialogue between families and other social institutions inspired by full reciprocity and equity vis-à-vis the new generations.

This is particularly important in the so called "divided families". It has been increasingly noticed that divorce is detrimental to children, particularly because of the fathers' absence. At the same time, it is more and more recognised that large-scale changes in fathers' behaviour is not likely to occur by simple modification of custody orders or improvements in child-support enforcement – or, really, by any measures addressed solely to *absent* fathers. Rather, what is required is a deeper and quite radical change in the way all fathers relate to their children. What is needed is a greater sense of shared responsibility and partnership in childrearing. Furstenberg and Cherlin (1991, p. 119) ask us: "can it happen?" They continue: "If women's wages in the labour market approach men's, women may have more leverage in negotiating shared parenthood in exchange for pooling incomes. But equality in earnings will also make it easier to be a single parent... Perhaps the best that we can expect is a family system with unions that are more egalitarian but less stable. Such a system might provide an improvement in family life for adults, but it would not be a clear improvement for children".

I take this as an example of the fact that the new needs of families lead us to a new interpretation of its social role: families need first of all to be recognised as social subjects in themselves, as systems which provide their children with fully shared protection even in the case of family breakdown.

On a larger scale, this means that society should consider more carefully alternative ways of operating on the family: can society increase individual rights as mere individual entitlements or has it to treat individual rights in a relational manner, which implies structuring rights and entitlements so as to push people into being willingly co-operative with each other?

It is more and more evident that national welfare states (including the European countries) have not taken into account the generational unbalances and their long-term effects. Today there are many empirical evidences that public policies must now engage in this re-orientation.

3. IS THERE SOMETHING LIKE A "SOCIETY OF FAMILIES"? ARE FAMILIES A SUB-SYSTEM OF SOCIETY?

3.1. *Let me introduce quite a simple idea*

In order to pass on from social needs to policy replies we must conceptualise the global issue at stake in a suitable manner. Whatever the definition of "the family" and of "family policy" (Dumon, 1987; Aldous & Dumon, 1990; Wisensale, 1990), one cannot speak of policies for families and children without having in mind an adequate representation of the role and functions that families as a whole perform for the entire society. In order to be effective, this representation should be based on a wide consensus.

Now, it is a legacy of the modern era to have differentiated our society into four fundamental sub-systems: the *economy* (with its markets), the *political government* (with its public administration), the *associations* (with their autonomous organisations) and *families* (with what? as far as I can see, I would like to reply: a specific welfare network linking formal and informal provisions and services).

Each one of these spheres has developed on the basis of its own symbolic code, with its own means, and has built up its own institutions, through a proper codification of rights and duties. When we speak of "national states" we refer to complex societal systems which are articulated on the premises of specific forms of social differentiation and integration among these four sub-systems.

From analogy, the construction of an integrated society must also make reference to the theory and practice included in such a representation. It has a long-standing and consolidated sociological tradition (fig. 1).

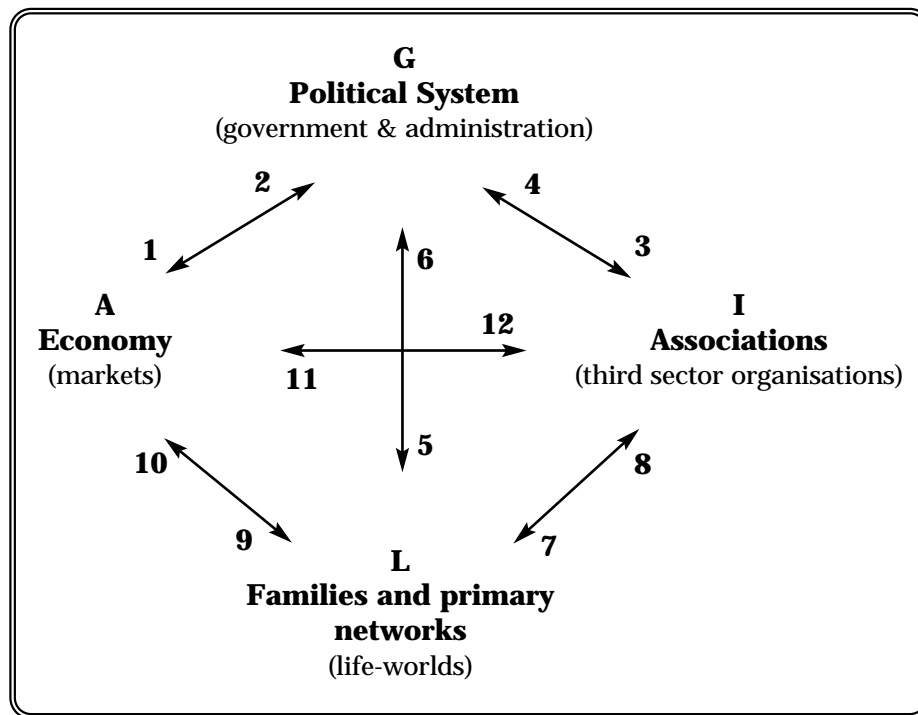


Fig. 1. The social structure of modernised societies.

As many sociological studies have elucidated, the two sub-systems of the economic market (A) and the political government (G) have been the hinge of global modernization in the last two centuries. They are built upon their specific generalised means of exchange, namely money and law. The other two sub-systems, associations (I) and families (L), on the contrary, have been penalised. So has their own role in society, which is to foster social solidarity, reciprocity, and trust in what sociologists call the “daily life-worlds”.

A lot has been written about economy and governments; entire libraries. As a matter of fact, political and integration across countries, dif-

difficult as it may be, seems to be anyway easier than social and cultural integration between them. Given for granted that we can pursue to a certain degree the economic and integration of societies, what about the integration of the other two sub-systems (associations and families)?

The European Union is a good example. Within the above depicted framework, in Europe families run the risk of being treated as a mere reference for consumption and social assistance. European Social Charter, in fact, does not mention widely and explicitly the social rights of families, in particular with reference to the generational dilemmas. As we all know, the national governments have different attitudes in relation to family policies, and the principle of subsidiarity has been recognised and institutionalised – in a quite reductive way – as a principle which afford each nation-State to do its own family and generational policies. At the beginning of the '90s, the setting up of a European Observatory on national family policies clearly indicated that the EU acknowledged the importance of the family as a social institution, while various measures and initiatives (particularly concerning child care facilities, adolescents commencing work life, poor children and migrant families) were forming the beginnings of a common framework for young generations' rights. It seemed, at that time, that social regulations in these field were becoming more and more inevitable. But the situation has deeply changed during the '90s. The European Observatory on national family policies has been reduced both in its ends and in its activities, while social regulations common to the national countries have been dismissed.

Now a question arises as to the latter two sub-systems (associations and families): what are their rights and duties? what is the citizenship accorded to them? To pursue a sound project of intergenerational solidarity means to accord a new strategic role to associations and families (Donati, 1987). As a matter of fact, we must admit that the "fourth sub-system" (families) is, in many regards, the least clear. It is not by chance that the sociological theory identifies it as the "latent sub-system" of the whole society (Donati, 1991, ch. 4). If governments can easily observe and guide the NGOs (Kaufmann *et al.* eds., 1986), this is much more difficult for families. But this is precisely why the challenge is interesting.

There is much rhetoric about families. They are mentioned in many documents, recommendations, laws, conventions, but we can hardly say that they are really recognised as a sub-system of society. On the contrary they are more often addressed as passive consumers, clients of social assistance, social "cells" which perform or do not perform the tasks that society

“delegates” to them. The appeals from the international associations speaking on behalf of families (see for instance the COFACE documents at the European level), clearly indicate all of this.

It is therefore an interesting theme to begin thinking in what sense and with what consequences families could and should be treated as a sub-system of the whole society.

3.2. *What does it mean?*

Families are a sub-system for the following main reasons.

a. Families perform a huge quantity of social functions which no state, no public administration, no market can “socialise”. Neither can these functions be “privatised”, in the sense of being considered a mere responsibility of private subjects, as sometimes governments do in order to reduce social expenses devoted to collective services.

b. Families certainly use the means of the other sub-systems (money, law, etc.), but they have their own means of communication and social exchange. We can think of *social reciprocity* within and between generations. Without such reciprocity there cannot exist trust and equity in society. It is the cultural basis of all our institutions. And it grows up inside the family before anywhere else.

c. In the end, families are the social location of those dimensions of generational equity which cannot be assumed by any other actor in society. It does not admit any functional equivalent.

3.3. *What does it imply?*

Recognising that families are a sub-system of society implies the need for more social regulations, but at the same time a *peculiar form of regulation* which can allow families to become a social movement and act as a “social subjectivity”. Present advanced industrial societies cannot avoid creating a more attentive policy towards the sub-system of families for the simple reason that what happens within it has many deep repercussions in all the other sub-systems (the labour market, the social security system, the organisation of social services at large) (Donati, 1990/b).

It is a traditional attitude of national governments not to enter into the private sphere of the family. One must certainly respect this stance, which guarantees a legitimate sphere of autonomy for people. But, on the other hand, society cannot abstain from regulating those social structures

and behaviours from which many social problems stem, such as child neglect and abuse, the abandonment of the elderly, and so on (Hantrais & Letablier, 1996).

The problem is: how do governments intervene within the family domain? After policies are decided, who will implement them? What is the role of public bureaucracies vis-à-vis family networks and associations? Do public agencies behave as *intruders* or *enablers*?

It is certainly true that families, as I have already said, are accentuating their private features. But if our analysis stops here it will be incomplete and biased. In reality, families are also subject to an increasing process of "publicisation", which is inevitable and necessary to ensure social justice in the public realm. The seeming paradox of a double process of "privatisation" and "publicisation" of the family is yet to be understood (Donati, 1990/a). But we cannot have any doubt about the fact that it is happening. The crisscrossing of what is considered to be private and what is public in the family grows inevitably.

The main problem is not to recognise that families are more and more important at the public level, but to understand why this importance expands in a *latent*, unrecognised way. Thinking that families are only a "cultural survival" or mere "private business" is a big mistake, both from a sociological and from a social policy point of view.

Briefly, to contend that, in society at large, families constitute a sub-system means making it clear that they have something in common, and that this commonwealth has precise societal functions which do not admit any functional equivalent. If this is true, then this sub-system should get - *as such* - an adequate symbolic representation and an explicit full citizenship for itself and for its members. It is of the utmost importance that such recognition be in line with the solution of what is mostly at stake: generational equity.

4. A NEW FRONTIER: THE STRUGGLE FOR INTER-GENERATIONAL EQUITY

If the arguments presented so far are reasonable, then it is right to claim that policies for family and children are becoming more and more a question of *equity between and within generations*. It is therefore particularly important to clarify what "generational equity" means. To my mind, generational equity has different meanings, and also different spheres in which it may or may not be achieved.

a) There are at least *three different dimensions* to be distinguished.

(i) *Equity between generations in the use of resources available to copresent different age groups at a given time.*

Strictly speaking, *generational equity means allocating the available resources according to criteria of justice in the way that the shares are distributed to the various age groups.* For instance: how much is given to children in comparison with what is given to adults and the elderly?

For the best solution of these issues it is necessary to adopt two basic criteria: first, the adoption of *rules of compatibility* (what is given to one generation, e.g. old people, must be in balance with what is given to another, e.g. children); second, the adoption of *measures that can result in non-zero sum games*: in other words, measures which can create other resources by stimulating help, solidarity, and co-operation given by one generation to another.

Inherent to this concept is the fact that it concerns not only the present time, but also the future. What we do now to the younger generations has repercussions on what they will be able to do in the near future.

(ii) *Equity between generations in the transfer of resources from one generation to the next.*

We have to analyse the *generational impact*: what a generation leaves to the following one and how it affects its life chances. The impact has, of course, *cultural* aspects (in terms of values, norms, and styles of life which are transmitted to the younger generation), *psychological* aspects (adults can give more or less trust and sense of security to their children), *economic* aspects (older generations can leave a greater or lesser share of work, greater or lesser resources of social security, larger or smaller shares of assets), *ecological* aspects (one generation can leave a more or less polluted environment, and more or less natural resources).

In a broader sense, then, generational equity means investing in the new generations so as to equip them adequately in order to meet the challenges they will have to cope with, taking into account how much the preceding generation has consumed and therefore the problems of scarcity which are transferred to the future.

For the solution of these problems it is necessary that *the ratio between what is presently produced and consumed be positive.*

(iii) *Equity within a newborn generation.*

It concerns the treatment of newborn people in relation to the generational "charge" assumed by their own family of orientation. Since each family contributes in a different way to the reproduction of society, *coeteris paribus*, there is a difference between growing up in a family as an only child and growing up as the brother or sister of another child or other children. This factor means different opportunities for any social achievement.

In this sense, generational equity concerns the exigency of eliminating or compensating for the disadvantages which derive from the fact of being reared in a family which has a different generational load in respect to other age peers.

If we do not take this dimension into consideration, then the public and private transfers end up by heavily discriminating on children: some of them will be privileged while others will be condemned to the so-called cycle of deprivation as a result of their parents' generational choices.

Public policies must be inspired here by two main guiding criteria. Firstly, minors should all have the same opportunities of access to social entitlements independently of their family composition and standard of living. Secondly, childless families (childless people, and even firms) should pay something more for families who have children. At least taxation systems should benefit families with children in respect to childless families more than occurs today.

b) Beside the three dimensions sketched above, one must consider the different *social spheres* where the issues of generational equity are (or should be) managed: the private sphere (families and "social private" networks) and the public sphere (state and markets).

In the past, most of the transfers were handled within the kinship, a fact which has contributed to a high degree of social inequality. Today, society mediates these transfers to a greater extent. But are these operations really in line with the pursuit of generational equity?

Many research results say that this is not the case. The redistribution operated by the state can be, sometimes, even worse. Or, in any case, it might well be that it does not reach the goals of a real generational equity in the three above specified dimensions.

Usually this happens because public redistribution (to poorer families) and transfers (schemes of social security) are not tuned to the family composition and its position in its life cycle.

In order to see the whole picture of the generational equity issue, I will sketch a figure (fig. 2) which we should consider carefully.

| <i>Spheres for the management of intergenerational solidarity (equity):</i> | | |
|---|--|---|
| | public (3. state and 4. regulated markets) | private (1. family and 2. primary networks) |
| <i>Dimensions of generational equity as:</i> | | |
| i. redistribution of resources between copresent generations | <i>a</i> | <i>b</i> |
| ii. ratio between present consumption and investment in future generations | <i>c</i> | <i>d</i> |
| iii. equality of opportunity for the newborn in relation to the generational charge assumed by the families in which children are born | <i>e</i> | <i>f</i> |

Fig. 2. Dimensions and relational spheres which define the issues of intergenerational solidarity (equity).

If we pay attention to the six cells of fig. 2, many interesting questions arise. At the present state of social research we can answer only a few of them.

a. How efficient are families in the redistribution of resources between co-present generations? It seems that this is the most important function

that families perform, and there is evidence that they still do it quite well when they stay intact. This becomes an issue where families split up.

b. How efficient are states and markets in the redistribution of resources among copresent generations? We do not have good research findings on these topics. They must be left to future investigations.

c. What is the present ratio between consumptions and investments in future generations within the family? Recent research shows that, in most countries, families save less and less money. But, due to the restrictions in fertility, in the short run they can invest more on fewer children. In this way, anyhow, they transfer to the collectivity the costs of a private gain, since they have contributed less than others to the reproduction of society.

d. What is the present ratio between consumptions and investments in the future generations on the part of state and markets? This is a very complex question which cannot have a well-documented answer. We need more investigation.

e. Do families succeed in assuring equality of chances to their children vis-à-vis their different composition (number of children)? Empirical surveys show that this is not the case.

f. Does the state succeed in assuring equality of chances to children vis-à-vis the different composition (number of children) of their families? Some success has been achieved, but a lot has still to be accomplished. The last question: "do markets succeed in assuring equality of opportunities for children vis-à-vis the different composition (number of children) of their families?" has a clearly negative reply.

The conceptual framework I have put forward here can at least be useful in assessing the issues at stake and in promoting new investigations which can help in pushing the envisaged change towards more equity.

5. SOCIAL POLICIES: UP-DATING THE AGENDA AND LOOKING FOR SOUNDER AND MORE EFFECTIVE STRATEGIES

5.1. *Up-dating the agenda*

Only very recently national governments have put families and children on its agenda. The spirit of this agenda is clearly to help families in performing their functions. Most governments today explicitly recognise the need for new interventions in order to improve family life. These interventions are devised in many different and well articulated fields, in particular:

women's condition and motherhood; income and social security, particularly in cases of broken and at risk families; child-care services and provisions.

In the light of what I have claimed so far, all of these goals are certainly very important and relevant. However, one can wonder whether there is a global design and adequate strategies behind them. The envisaged measures are undoubtedly needed, but they could be insufficient in the long run for managing the issue of generational equity. We are always exposed to the risk of being behind the times. Up-dating the agenda means, in fact, to grasp the novelty of a situation, its discontinuities and the wider scenario it reveals.

5.2. In the long run, the *global design* to be pursued must aim at creating those social conditions which can allow families and children to master an increasingly risky environment. This design can be sketched in terms of *general goals* to be pursued and of the *strategies* they require.

5.3. As to the general goals, *they can be devised as follows*

– *The reform of social security systems according to the family life cycle.* As it has been shown by many national experiences (see Vella ed., 1990), social security systems are never indifferent to family and child needs: they always reward or penalise them. Social security schemes must be designed with more flexibility so as to adapt to the differential load families have in the different stages of their life cycle, with respect to the number and social conditions of their members.

– *A bigger investment in new generations.* Families seem to invest less and less in new generations. Some nation-states have picked up this task increasingly, but without an explicit policy. It is nowadays more and more evident that, if they want to survive, governments must assume more responsibility for what one generation leaves to the next in terms of public resources, taking into account not only the economic, but also the cultural, social, and ecological dimensions of generational transfers. So far a few researches have been done on this topic (Modell, 1989).

– *Real freedom of choice in having babies.* To rebalance the ratio among generations means putting families in the condition to have a number of children close to the replacement level. The point is not to adopt pro-natalist policies in the spirit of incrementing the population, but to take up policies oriented towards more social justice. Apart from the fact that incentives in favour of pro-natalist policies would have min-

imal effects, the problem is basically to fill the gap between the number of children that couples really have and the number of children they would like. With high probability, this means bringing the fertility ratio up to about 2.1 children per woman; but this is not easy. For instance, in Italy, to elevate the fertility rate from the present level (1.2 children per women) up to 1.8 would mean that about 30% of all women should have a third child, which is a very difficult and costly target.

5.4. *In order to pursue these goals it is necessary to develop consistent public strategies. The latter can be outlined as follows.*

– *The structuration of welfare interventions along family lines.* If we recognise that the welfare state cannot substitute parents' responsibilities, then its main task is to sustain them through collective arrangements which are adequate for the peculiarities of family life. In a sense, the whole social organisation should not only pay attention to family needs, but be structured according to them. Consequently, we need strategies which are able to enhance *time-to-care measures* (e.g. parental leave, etc.), *family designed services* in educational settings, personal social services and health settlements, and more generally the *familisation of welfare packages* (home care, etc.) even when the request for help comes from an individual alone.

– *The interplay between formal and informal services through a community care policy.* Statutory and informal aid are not to be seen as opposites or substitutes, but, on the contrary, as complementary and operating together: the key idea is to foster networks linking together primary groups and public services according to co-operative styles of intervention.

– *The development of social organisations (NGOs) mediating the linkages between families and political authorities* (local/regional, national, supra-national). This means the fostering of family-based voluntary organisations, cooperatives, mutual and self-help groups, associations, and so on, provided that they are able to perform intergenerational solidarity.

– *Intersectorality in social policies.* Policy measures should link together different sectors of intervention in meeting different needs (economic, social, educational, health, etc.).

– *The adoption of policy styles inspired by what has been called "relational guidance",* which means involving families, both as individual entities and as collective (i.e. associated) bodies, in designing plans of intervention.

The emerging idea is that social policy is not integrated simply because it has its "centre" in the state, but because it is able to grasp the needs of

people's life-worlds and to cope with them by focusing on the family as a unit of primary services in the community.

6. CONCLUSIONS

6.1. In the last few decades, most countries have adopted policies for families and children which have been largely implicit, indirect and fragmented (sectorialised). The result has been a deep worsening of intergenerational relations.

Today national welfare states cannot get any improvement if they do not recognize that families must be helped to understand and cope with the problems of intergenerational solidarity and equity on a large scale and in the long run. We are in need of a new global rationality for the whole society.

Social policies aimed at solving the social problems of particular family forms (socially weak, at risk, and pathological families) are missing this perspective. It becomes therefore more and more relevant to design and implement a framework for social policies addressing all families, i.e. the family conceived as a social relationship of full reciprocity between genders and between generations. This approach does not deny the necessity of supporting, through specific additional regulations, people who choose different living arrangements.

6.2. *This idea implies what I would like to call the search for a new post-industrial citizenship.*

a. *A new citizenship for children* (rights and duties). Children must be recognised as active subjects who become more and more aware of their social condition and must be given earlier and earlier the opportunity to speak with their own voices, and assume their own responsibilities, in the family as well as in schools and welfare institutions (personal social services, courts, and so on).

b. *A new citizenship for families* (rights and duties). We must recognise that the family has its own rights to be and act as a solidarity group linking generations over time (P. Donati 1998). Such a recognition should be inspired by values of equity between generations. This implies, among other things, that governments shall aid all couples willing to have babies to have them effectively, to enjoy the social rights connected with this goal (lodging, minimum income, education, health, social security) and to see

these rights as human and political rights, and not as charity or political "grants".

The shifting from industrial to post-industrial citizenship means that our societies must recognise that, for children and families, social entitlements are a question of human dignity and social solidarity, not a consequence of their position with reference to the labour market or a result of political lobbying or the actions of pressure groups.

The building up of modern societies has so far been based upon an interplay between the state and the economic market. Such an interplay has favoured a process of modernisation which has contributed to the betterment of material and living conditions, but it has at the same time strongly penalised local communities, primary social networks, and also family life. Today it is important to acknowledge that such a project needs a *cultural basis*. The argument I have tried to present is that this basis may consist in a *caring culture* oriented towards the fulfilment of people's rights as they concretise in their daily life-worlds.

The premise for this fundamental shift of focus lies in the acknowledgement that human well-being is not an individual or collective condition abstracted from the concrete community we live in, but a relational process of mutual reciprocity between *Ego* and *Alter* in any field and at any level of social interventions. It starts in the family. "Intergenerational solidarity" signifies all of this.

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