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EDITORIALE

EDITORIAL

La Dichiarazione del Dicastero per la Dottrina della Fede pubblicata l'8 aprile 2024 necessita di non poche premesse per essere percepita nella sua valenza originale presso coloro che non hanno dimestichezza con il mondo Vaticano o cattolico in genere.

Diciamo che si tratta di un documento sia teoretico/fondativo che di indicazioni per la prassi.

L'autore, il firmatario ufficiale, è il Cardinale Victor Manuel Fernández che ha la funzione di consultore teologico molto stretto di Papa Francesco. Tanto da essere stato recentemente messo a capo del dipartimento vaticano più importante dal punto di vista dottrinale e disciplinare.

In pratica il cardinale elabora, sviluppa, redige, propone al Papa i testi che il Pontefice ritiene importanti ed in tal modo il nostro testo è espressione diretta di Papa Bergoglio. Nella Presentazione il cardinale dice: «Il Papa [il 13 novembre del 2023] ... mi ha inoltre chiesto di evidenziare nel testo tematiche strettamente connesse al tema della dignità, come ad esempio il dramma della povertà, la situazione dei migranti, le violenze contro le donne, la tratta delle persone, la guerra ed altre».

Chi ha letto il volume/intervista *LIFE. La mia storia nella Storia*, scritto dal Papa stesso con il giornalista Fabio M. Ragone, può comprendere la Dignitas infinita come il fondamento teoretico e "amministrativo" che sta dietro e sostiene l'auto comprensione di Papa Bergoglio. In *LIFE* abbiamo l'esposizione dei sentimenti e pensieri personali di questo vescovo gesuita, ma in DIGNITAS ne vediamo le strutture portanti e le conseguenze operative.

Non per nulla il Card. Fernández nell'Introduzione a DIGNITAS racconta l'iter di nascita ed elaborazione del documento, parallelo allo sviluppo dell'azione multiforme del Papa. Non uno sviluppo di "parallele che non si incontrano mai", bensì i "due binari di una stessa linea ferroviaria", o se si vuole: *LIFE* sono i binari sui quali si muove Bergoglio, mentre le traversine che li sostengono sono esposte nella DIGNITAS. Perché Bergoglio in questo è molto simile a Roncalli: entrambi non

Dignitas infinita?

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sono dei filosofi/teologi teoretici ma uomini di governo che perseguono ideali ben radicati perché personalizzati.

Detto questo, ci possiamo chiedere: qual è dunque il significato di DIGNITAS sia all'interno della vasta chiesa cattolica che del mondo che la circonda? Non dimentichiamo che la chiesa cattolica a livello globale è una delle più vaste strutture sociali in assoluto e che quindi ha delle responsabilità di istanza morale non trascurabili.

La Dichiarazione è composta da due parti essenziali: una teoretica e una operativa. Operativa nel senso che si risale da tutta una serie di azioni indicate come contrarie alla dignità della persona umana per mostrare come certe linee teoretiche ci aiutino a fondare questo rigetto ed a prepararne al contrario gli sviluppi positivi. La metodologia è parallela a quella della nostra esperienza individuale: vedere atti e situazioni che ci urtano moralmente ci aiuta molto a formulare e attualizzare i nostri valori morali, spesso impliciti.

Qualche cosa di simile aveva inteso fare Giovanni Paolo II con la sua enciclica *Veritatis Splendor* (1993).

Trent'anni dopo la situazione intra-ecclesiale e quella della secolarizzazione dell'Occidente è diversa, le facoltà di teologia cattolica sono in crisi di alunni e di docenti accademici, il clero è diminuito e soprattutto invecchiato. E poi ora i mass media hanno preso una tale rilevanza sociale da condizionare letteralmente ogni ambito del pensiero e dell'azione dei singoli e delle istituzioni sociali.

Questo però non ci dispensa dalla convinzione che sia necessario per un dialogo interno ed esterno aver chiari quali sono le proprie posizioni dalle quali partire per il dialogo, e da proporre anche ad altri. La fluidità sociale non deve riversarsi sul dialogo teoretico, altrimenti si fa dello *small-talk*, del dialogo da salotto e non della discussione seria ed impegnata.

DIGNITAS, nella mia comprensione, è dunque per Papa Francesco l'esposizione dei principi cattolici che reggono l'antropologia cristiana nel mondo

presente e che quindi ha ricadute precise per uscire da "alcune gravi violazioni della dignità umana". L'elenco di queste ultime inizia con il "dramma della povertà, la guerra, il travaglio dei migranti..." per elencare anche "abusi sessuali, aborto, maternità surrogata ..." mostrando, come già accennato, che il Papa ha espressamente integrato l'istanza sociale a quella bioetica. Giornalisticamente si parlerebbe - se non fosse una sciocca banalità - di destra conservatrice e di sinistra progressista.

Papa Francesco, lo sappiamo è fatto di un'altra pasta da quella di Giovanni Paolo II e proviene da un contesto sudamericano (e mondiale) ben diverso. Le "sue scelte pastorali" circa l'ammissione all'Eucaristia dei divorziati risposati o la benedizione dei matrimoni omosessuali, non sarebbero probabilmente condivise dal Papa polacco, ma questo non ci può far concludere che la loro antropologia cristiana ed umana sia molto diverse. GP II era stato docente di Etica Filosofica all'Università di Lublino e Papa Francesco Arcivescovo di Buenos Aires: le idee altamente astratte non sono marcate geograficamente, mentre lo sono i sentimenti e l'autocomprensione.



Homo Thomisticus and Homo Oeconomicus: On Economic Freedom

Albino Barrera, O.P.

Introduzione

What difference can Thomism make in the real economy? Consider the following two well-established empirical observations. Empirical observation #1: We may note an inflection point in per capita income at the time of the Industrial Revolution. Empirical observation #2: From the 1950s onward, we see a similar clear inflection point in population growth.

Combining these two observations, we may note how the post-World War II era has not only supported the largest population ever, but it has done so at the highest per capita income ever in all human history. This is not even to mention the much longer life expectancy, on average, and the drastic material improvement in the standards of living for the vast majority relative to other periods of human history. On average, people need to expend less hours of labor to secure food, clothing, shelter, and other basic needs. Clearly, science and technology played a pivotal role in such dual advances, but even science and technology themselves have grown exponentially because of the milieu afforded by the marketplace and its extensive freedom of action. Schumpeter's "creative destruction" is a hallmark of capitalism and its wide freedom of action. Adam Smith wrote in reaction to the rigidity and restrictive nature of mercantilism in calling for greater economic freedom. The butcher, baker, and brewer's pursuit of their own self-interest eventually rebounds to the good of the community because of the wide sphere of autonomy accorded them by laissez faire capitalism relative to mercantilism.

I am not claiming causation in advancing these observations. Empirical work will have to be done to establish the correlation, much less causation, from wide economic freedom of action to the two empirical observations I noted. All I am claiming is that economic history suggests the potency of the invisible hand and mainstream economic policies regarding expansive freedom of action. The freedom of

action of *homo oeconomicus* is about unleashing the power of private initiative. Economic growth and development are often defined as widening people's choice set. Development has also been described as freedom—whereby we develop people's functionings and capabilities so that they are able to pursue their life projects¹. Development as freedom is about expanding people's choice set.

Nevertheless, I suggest that the signal accomplishments of the last 250 years—the world supporting the largest population ever and at the highest per capita income in all human history—must be viewed within its much larger context. These signal accomplishments are merely a partial view of a much larger whole. We must consider the price paid for such historic economic growth. We now understand much better the damage done to the ecological system. In addition, most of us here have firsthand experience of the destitution, hunger, illness, illiteracy, violence, and many other ills that lurk behind these two signal empirical observations from the last two and half centuries. This is a problem that comes with relying on averages without looking at the distribution. These ills attest to the inadequacy of economic freedom defined merely as a freedom of action. And this is where Thomism can make a major difference in complementing *homo oeconomicus*.

Main teachings

In addition to his teachings on the just price, the ownership and use of private property and superfluous income, among many others, St. Thomas offers an overarching cosmology and anthropology that shape every aspect of socioeconomic life. Thomism can make not merely substantive but sweeping contributions to socioeconomic life.

The impact of Thomism on economic theory and praxis is best seen in the difference it makes with respect to our notion of freedom. Observe that in the

circular flow chart descriptive of the economy, choice is a perennial task. Households as sources of input must decide how much and to whom to sell their services or their assets to earn income. As consumers, they must decide how to allocate their earnings to satisfy their needs and wants. Businesses for their part also confront decision-making whichever way they turn. As buyers in the input markets, they must choose the optimum combination of factors of production to employ. As sellers in the product market, they must decide what to sell, to whom, where, when, for how much, what quality, and with which production method. In both the input and product markets, there are choices that must be made at every turn as people consummate their transactions—with whom to trade, when, how much, and at what price. Indeed, it is not surprising that economics has sometimes been described as the science of allocation or the science of choice.

Let me contrast the conception of freedom between neoclassical economics and praxis, on the one hand, and Thomism, on the other hand. I will do so by comparing them across seven dimensions. This is by no means an exhaustive presentation. I am only covering materials that will fit within the time allotted to me. By "*homo oeconomicus*" (HO), I am referring to both the economic agent of neoclassical economics and to the most common conception of market participants in Western capitalism.

1. Nature of freedom

To begin with, for *homo oeconomicus* (HO), freedom is identical to choice. They are the same set. Choice exhausts everything that can be said of freedom. Choice is all there is to freedom. It is a freedom of action, which also happens to be the most common understanding and practice of freedom in the West. *Homo Thomisticus* (HT) also affirms the importance of choice in freedom. Choice is a neces-

sary condition of freedom. People must be able to choose if they are truly free agents. However, unlike HO, HT is adamant that while choice is a necessary condition of freedom, it is not a sufficient condition. There is a lot more to freedom than mere choice. Choice does not exhaust everything that can be said of freedom. Choice is merely a subset of freedom. They are not identical sets. We will come back to this at the end of the presentation to find out what else there is in freedom besides freedom of action.

2. Scope and strength of freedom's claims

Second, let us examine the scope and the strength of the claims that come from these differing views of freedoms. HO enjoys strong, indeed, near absolute claims. They are not absolute because neoclassical economics understands that the marketplace is undergirded by a requisite legal and institutional framework. This is a precondition if the market is to exist at all. For example, markets will not work if there are no enforcement mechanisms for contracts. Aside from these legal and institutional constraints, HO enjoys an extensive set of freedoms, such as, consumer sovereignty in setting and pursuing one's preferences, the freedom to maximize such consumer preferences, and not having to distinguish between needs and wants (everything is fair game). HO is free to consummate whatever transactions are desired for as long as it is backed up by purchasing power. Anything can be bought or sold in the marketplace for as long as they satisfy the legal and institutional preconditions of the marketplace. Thus, we have the phenomenon of commodification, such as renting a womb in commercial surrogacy or buying a kidney, in jurisdictions where these are legally permissible. As a rule of thumb, the scope of freedom accorded to HO is maximized in a similar fashion to liberalism's approach of according to each individual maximum freedoms that are consistent with everyone else enjoying the same freedoms.

In contrast, HT has far more delimited freedom. Thomistic ontology not only explains why this is so, but also

identifies the boundaries that such freedom may not overstep. Consider the difference between God and the human person vis-à-vis existence. On the one hand, God does not need anything or anyone for God's existence. Otherwise, God would not be God at all. God guarantees God's own existence. In fact, God's existence is eternal. There is no $t=0$, that is a beginning, for God. In other words, it is in the nature of God to exist. Existence is in the very nature of God, *ipsum esse subsistens* (ST I, q. 3. a 4; q. 4, a. 2). On the other hand, human beings have a $t=0$; they have a beginning. They are unable to guarantee their own existence. They do not know what will happen to them in the future, not even in the next minute. They are not a cause unto themselves. They are dependent on so many other things, not only for their existence but also for their operation. It is not in their nature to exist. This is empirical observation #1. We have a second empirical observation that must be juxtaposed to this. Even as it is not in our nature to exist, we nonetheless know that we exist. How do we reconcile these two empirical observations? It can only be that human existence is a conferred existence, a created existence, a borrowed existence—an existence that participates in the existence of the Necessary Being, God.

This contrast regarding the nature of Divine and human existence has ramifications for Divine and human freedom. God's freedom is absolute. Absolute existence has absolute freedom. God can claim "I am what I will." In contrast humans, are unable to make a similar claim of "I am what I will." We may not want to have to sleep because it is a waste of practically a third of the day, but no matter how much we may wish not to sleep, we will nonetheless have to sleep. We may will to be in two places at the same time or to fly unassisted to wherever want, but no matter how much we will these things, we know that they will not happen. Why? Because they are not within the bounds and the capabilities of the human nature that comes with our existence. Consequently, human freedom, including economic freedom, is not absolute. It is merely a participated freedom. It is delimited by our human nature. It is

bound by a divine order of creation within which we participate in the existence of the Necessary Being.

3. Freedom and responsibility toward others

HO's freedom of action is as extensive as its responsibility to others is minimal. Milton Friedman says it well in his famous New York times article "The Social Responsibility of Business Is to Increase Its Profits" (September 13, 1970, Section SM, Page 17). In what has sometimes been called a Friedman doctrine, he notes that the only social responsibility of business is its obligation to its shareholders to maximize its profits. He makes this claim not because he is a proponent of egoism, but because of his belief in the invisible hand so well described in Adam Smith's butcher, baker, and brewer inadvertently ensuring the provision of the community by pursuing their respective interests. HO does recognize that it is bound by responsibilities. However, this is an extremely limited set of duties—its contractual obligations and those stemming from the legal and institutional preconditions of the marketplace. HO is bound by a minimal set of responsibilities.

In contrast, HT acknowledges that it exists within a much larger divine order of creation. Consider St. Thomas's twofold order of the universe. The whole universe as a single entity finds its perfection only as it rests in God—the Perfect and the True. Beings tend toward their perfection, their end (*telos*). The final end of all creation is God, who is their origin to begin with.² St. Thomas calls this the external order of his twofold order of the universe.³ The external order refers to the whole universe as a single entity reaching out for its final end in God. This is the perfection of the universe as a whole, the *telos* (end) for which it is created and the *telos* that comes with its participated, contingent existence.⁴

Besides this external order, there is also the internal order of the universe. The whole universe is comprised of a wide variety of creatures, each with its respective nature and power, each with its respective mode of being and operation. Each creature belongs to intermediate groups through which they

contribute to the whole of creation and from which they derive benefits.

Each creature of the universe has its contribution to make in the perfection of the universe as a whole. Each creature does its share through the intermediate group(s) to which it belongs in moving the universe to achieve its final end in God. And as each creature or intermediate group contributes to bringing about the external order of the universe, it is then that we achieve the internal order of the universe. Of particular interest to us is the contribution of human beings.

Humans belong to communities through which they contribute to the twofold order and from which they derive benefits. As humans fulfill their respective responsibilities and roles, they promote the good of the communities to which they belong (intermediate

groups), and these in turn contribute to the attainment of the good of the whole. In effect, it is through these communities that humans, as individuals, can achieve their moral excellence and their final end. It is through communities that humans contribute to the attainment of the *telos* of both the internal and external order, and thereby actualize their freedom. Jacques Maritain reminds us that human freedom, while instantiated in the individual, is actualized only in community.⁵

As part of the twofold order of the universe, every human person is bound by moral obligations vis-à-vis other creatures. Every person bears moral responsibilities toward (1) other people and (2) the goods of the earth. Other people and the goods of the earth (indeed, every creature), bear in their existence and communicate in their

activity a particular dimension of God's goodness. *The human person's responsibility in this regard is to facilitate the reflection and conveyance of their share of God's goodness other creatures, according to their mode of being and operation.* This human responsibility becomes even weightier and even more demanding because moral agency is a profound and potent gift that only humans enjoy. Ontologically, the New Testament adage applies just as well: To those to whom much has been given, more will be demanded (Lk 12:48). In concrete terms, and in relation to this presentation, this means that every person bears moral duties toward (1) the goods of the earth and (2) their fellow humans. Not surprisingly, unlike HO, HT is bound by strong and extensive negative and positive duties



4. Post-choice accountability

A fourth point of comparison is that of post-choice accountability. HO's choice is not, and cannot be, second-guessed after such choice has been exercised. The import of HO's choice is not examined by a third party for its consequences or quality. Recall that HO enjoys near absolute claims in its sphere of autonomy. Moreover, the marketplace and HO are governed by utilitarianism in which there are no moral absolutes. *De gustibus non est disputandum*. HO's tastes and preferences are unexamined because they are indisputable. People are assumed to choose what is in their own best interest. Otherwise, they will not trade at all in the marketplace if such trade leaves them worse off. Adam Smith's butcher, baker, and brewer are not questioned over their pursuit of their self-interest. In fact, for HO, there are no socially laundered preferences even if they are anti-social. In other words, HO is not subject to second-guessing for any choice it makes for as long as it is within the bounds of the underlying legal and institutional preconditions of the marketplace. To put it bluntly, it is nobody's business. HO is bound by a "thin" theory of the good, consistent with its underlying utilitarianism. Moreover, recall that neoclassical economics touts itself as a mere positive, descriptive exercise. It claims to be non-normative. (Assessing this claim is best reserved for another paper given our time constraint.)

In contrast to the static nature of HO whereby choices are not reviewed after they have been made, HT has a dynamic post-choice examination. In fact, this post-mortem is a requirement and not merely optional. It is expected. Recall that HT works out of an acknowledged divine order of creation. It has a "thick" notion of the good that includes moral absolutes. There is a requisite examination of the quality of HT's choices against this overarching moral backdrop. Furthermore, the impact on human flourishing is always a concern. In addition, the human faculties of will and reason are not given to humans in their perfected form. Humans spend a lifetime of learning-by-doing in getting better with the use of these faculties. The reflexive

nature of moral choices makes it imperative that our choices are constantly examined. This is an essential path to growth in virtue. HT welcomes rather than resents such post-choice reviews as opportunities for growth and further development. And, of course, besides such a reflexive impact, our choices have extensive ripple effects on our neighbors and the world around us. Choices are never purely personal because they have a significant constitutive social dimension to them since people are part of a community to which they contribute and from which they derive benefits. Recall the responsibilities that arise from the twofold order of the universe. This social dimension of choice also requires post-choice accountability on our part.

5. Role of reason and will

A fifth point of comparison is the role played by the human faculties in the exercise of choice. For HO, the will is the lead faculty. In fact, only the will is needed because HO is concerned only with exercising choice. "Rational choice" in economics does not mean the use of reason. Rather, rationality as used in neoclassical economics is about the completeness of one's preference set and consistency in the choices therein. In contrast, HT requires both reason and will to work with each other in making choices. The object of the will is the Good, that which we perceive as perfecting and completing us. The will pursues the Good. However, the will has two significant limitations. To begin with, it cannot distinguish real from mere apparent goods. Consequently, it often pursues what it perceives to be good, but which in reality is a fake good. In addition, the will is unable to do a triage of all the worthwhile goods that are presented to it. It is not equipped or designed to do so.

Reason dovetails with will, in that reason seeks the Truth. The object of reason is the Truth. Consequently, it can differentiate real from apparent goods. Moreover, it is also able to weigh goods relative to each other. Not only can it do a triage of the goods that are worth pursuing in life, but reason is able to go further in identifying the means to get to the goods that it deems

to be worth pursuing in life. HT is dependent on the tandem of will and reason as it makes its choices. Thus, freedom for HT is aptly called rational freedom in contrast to HO's freedom of action. Genuine freedom requires choices that are informed and reasoned. Both intellectual and moral virtues play a vital role in HT's exercise of economic freedom.

6. To what end?

Our sixth comparison deals with the question: To what end do we exercise our freedom? For HO, this is not even a valid question to ask. After all, it is nobody's business how HO chooses within the sphere of its autonomy. (Recall consumer sovereignty.) This stems from the "thin" theory of the good that comes along with the claim of both utilitarianism and neoclassical economics that they are non-normative, purely positive exercises. In contrast, for HT, this is not merely a valid question, but it is in fact the very first question that HT asks even as it weighs the triage of choices at hand.

We started out our comparison by noting that for HT, there is more to human freedom than mere choice. So, what else is there in human freedom besides freedom of action? Consider the following three constitutive elements of human freedom.

6a. Moral excellence

In addition to their initial endowment of existence, creatures embody many other dimensions of God's goodness. Just as significant, every creature reflects and communicates to the rest of creation such particular divine goodness as is according to its mode of being and operation. Humans, for their part, are unique because of their mode of being and operation—they are rational and free. Moral agency—the faculties of reason and will—allows humans to reflect and communicate God's perfections and goodness in a very special way.⁶ In particular, the informed and intelligent use by human beings of their freedom, their virtues, and the excellence with which they lead moral lives allow them to shine fully in their creation in the image and likeness of God. In other words, humans reflect

and communicate the share of God's goodness they embody through their moral excellence. *Ontologically speaking, living up to our moral obligations is about reflecting and communicating the goodness of God to the rest of creation according to our (human) mode of being and operation.* This is human freedom at its best. To use the language of neoclassical economics, while HO maximizes its utility function comprised of its preferences, HT is also engaged in a maximization exercise—the “maximization” of its reflection and communication of God's goodness.

6b. Participation in Divine Governance and Providence

The moral agency of human beings is what makes their mode of being and operation unique. Through their moral choices, human beings can either contribute to, or take away from, the internal and external order of the universe. Moreover, since they have reason and freedom, human beings are not purely mechanical in their contribution, as is the case of the non-moral creatures of the earth, which contribute to the aforesaid orders just by their existence. In the case of human beings, in addition to their existential goodness (i.e., the goodness they communicate by virtue of their existence), they also have the even more consequential moral goodness that stems from the cumulative reflexive impact of their moral choices. Human beings contribute to the twofold order in the manner in which they exercise their moral agency. In effect, human beings contribute a bit of themselves to the twofold order through their proper use of freedom and reason.

By virtue of their freedom, human beings can choose either to be mediocre or to excel in the use of their reason and will. This mode of being and operation makes them not merely instrumental but secondary causes. Moral agency is what is distinctive of their secondary causality. Through their efforts to achieve moral excellence (a virtuous life and reasoned use of freedom), human beings provide their unique share in bringing about the internal order of the universe. In effect, *human beings participate not merely in the*

existence of the Necessary Being (God), but they also participate as secondary causes in God's governance and providence of that created divine order. Our secondary causality is our participation in Divine governance and providence.

St. Thomas notes, “the rational creature is subject to Divine providence in the most excellent way, *in so far as it partakes of a share of providence, by being provident both for itself and for others*” (ST I-II 97.2). Human beings participate in the divine governance of the world as they live up to these moral duties in (1) facilitating other creatures' attainment of their respective ends (*teloi*) and in their communication of God's goodness according to their respective modes of being and operation and (2) in enabling the attainment by their fellow human beings of their shared *telos*.

6c. Union with God

HT will settle for nothing less than the highest good—union with God! Servais Pinckaers says it well when he notes that this is a freedom for excellence. This is the crown of human freedom.

Indeed, there is more to human freedom than mere choice.

7. Grace

HO simply takes the world as a set of constraints on its maximization of its preferences. HT also sees and recognizes the same world of constraints. However, HT goes much further in perceiving much more. It sees earthly reality as enveloped in grace. Earthly life is embedded within a much larger reality that is not accessible to the human senses. Human freedom is not a human attainment even given their secondary causality. After all, the real efficient causality of human beings is merely a participated efficient causality (*Summa Contra Gentiles* Book 3, Questions 69 and 70). Furthermore, moral excellence is a gift of grace. The acknowledgement of grace is yet another major difference between HO and HT in their views of freedom.

In sum, while HT has a much more circumscribed sphere of autonomy with significant negative and positive duties,

its rational freedom nevertheless ends up providing a much more substantive, consequential, and enduring freedom.

Back to the original question I had posed: What difference can Thomism make in the real economy? Let me conclude by examining possibilities for what HT and HO together can accomplish if they work hand in hand. The exercise of private initiative is important. Indeed, it is even a moral imperative. We see this in Catholic social thought's principle of subsidiarity, in which higher bodies do not arrogate to themselves functions that lower bodies or individuals are able to perform. People ought to be able to do what they are able to do for themselves. Nevertheless, HT can channel HO's private initiatives and even improve them through reasoned and informed choices. HT can help HO get better at making choices in a process of learning by doing through its requisite review of the quality and the consequences of one's choices. Most of all, HT can illumine HO on the *telos* stemming from within the larger divine order of creation that envelops us. HT can make its case even in a secular public square because it can make its points using either faith or reason, but ideally both.

Pope Benedict XVI observed that while globalization has made us neighbors, it has not made us brothers and sisters to one another (*Caritatis in Veritate* #19). HT can show HO not only how this can be achieved, but it can also explain why it is worth pursuing, along with the unimaginable joys that this brings about.

NOTE

See Sen, Amartya. 1989. “Development as Capability Expansion,” *Journal of Development Planning* 19: 41–58.

Aquinas (1947/48) *Summa Theologica* I, Q 19, a.2, reply.

See Wright, John. 1957. *The Order of the Universe in the Theology of St. Thomas Aquinas*. Analecta Gregoriana 89. Rome: Apud Aedes Universitatis Gregoriana.

Aquinas (1952-54) *De veritate* Q. 5, a.3. See Maritain, Jacques. 1947. *The Person and the Common Good*. Charles Scribner's Sons, New York.

Aquinas (1923) *Summa Contra Gentiles* III, 20.

Today, climate policy actors and scholars are shifting their focus onto factors that could speed up climate action because most countries are failing to deliver on their promises regarding the Paris Agreement (UNEP, 2022), and humanity keeps breaking ever-new wrong records on climate change (UNEP, 2023). The Sixth Assessment Report of the Intergovernmental Panel on Climate Change (IPCC, 2023) and COP28 (UNFCCC, 2023) pointed to just transition as one of these crucial factors. In the European Union (EU), the Belgian Presidency of the first half of 2024 has put just transition “at the heart of its priorities” (Council of the European Union, 2023, p. 4). Although there are different definitions of just transition, the International Labour Organization (ILO) provides a globally accepted one in its *Guidelines for a just transition towards environmentally sustainable economies and societies for all* (ILO,

2015). According to the document, just transition is a process “towards an environmentally sustainable economy” that “needs to be well managed and contribute to the goals of decent work for all, social inclusion, and the eradication of poverty” (ILO, 2015, p. 4). The just transition approach assumes that considering the negative social impacts of environmental transitions is the right thing to do and (therefore) can avoid political backlash and social conflicts (Heyen et al., 2021).

It is becoming increasingly clear that achieving the net-zero goal by 2050 will be impossible without good just transition policies. The EU’s just transition policy is noteworthy as it exemplifies the first regional-level implementation of such an approach. Therefore, I aim to explore and assess the emerging EU’s just transition policy framework in this article, drawing on EU legislation and

secondary scholarly literature. First, I will give an overview of the origins of the EU’s just transition policy and how it is implemented through the European Green Deal (EGD) framework. Then, I will compare the EU’s and the International Labour Organization’s (ILO) approaches to just transition. Afterward, I will describe and briefly assess the four main elements of the EU’s just transition policy framework.

1. The EU’s Just Transition Policy: Origins and the European Green Deal Framework

Just transition policy in the EU is shaped under the EGD framework, presented by the European Commission (EC) in December 2019 and approved in January 2020. The EGD Communication from the Commission states that the EGD is “a new growth strategy that aims to transform the EU into a fair and

Exploring the European Union’s Just Transition Policy: Evolution, Reach, and Future Directions

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prosperous society, with a modern, resource-efficient and competitive economy where there are no net emissions of greenhouse gases in 2050 and where economic growth is decoupled from resource use” (European Commission 2019, p. 2). Such a process of transformation is called the *green transition*.¹ As the EU acknowledges, it should be pursued in a “socially just manner” (Sabato *et al.* 2023, p. 7).

The adoption of the EGD is probably the most significant policy shift in the EU in recent years. For the first time, the ecological transition moved to the top of the EU policy agenda, which contrasted “starkly with the disastrous austerity agenda pursued by the previous Juncker Commission” (Matthieu 2022, p. 151). The EGD responded to the widespread urgency displayed in public opinion, and to the calls from the scientific community and civil society. Right before the presentation of the EGD, the European Environmental Agency (EEA) (European Environment Agency, 2018) and Eurostat’s analysis of progress towards the Sustainable Development Goals (SDGs) (Eurostat, 2018) indicated that “the policy of the two previous Commissions [had] failed to meet objectives and that a new approach must be taken” (Charveriat 2023, para. 3). The change of course was also demanded by civil society organizations such as the European Environmental Bureau (EEB), Climate Action Network Europe (CAN Europe), and Think2030. Moreover, the EU opted for a unilateral approach to climate policy because of some international realities of that time: the election of Donald Trump in 2016 and the US withdrawal from the Paris Agreement in 2017, as well as the loss of competitiveness in the area of environmental goods in the EU. The need and commitment to unilateral climate action through the EGD was strengthened even more when the COVID-19 pandemic exposed “the EU’s lack of autonomy in certain key sectors and value chains for both its economy and decarbonization” (Charveriat 2023, para. 16). Finally, Russia’s invasion of Ukraine caused an energy crisis in Europe and highlighted the even more urgent need to shift to renewable energy sources. The EGD and its just transition policy package

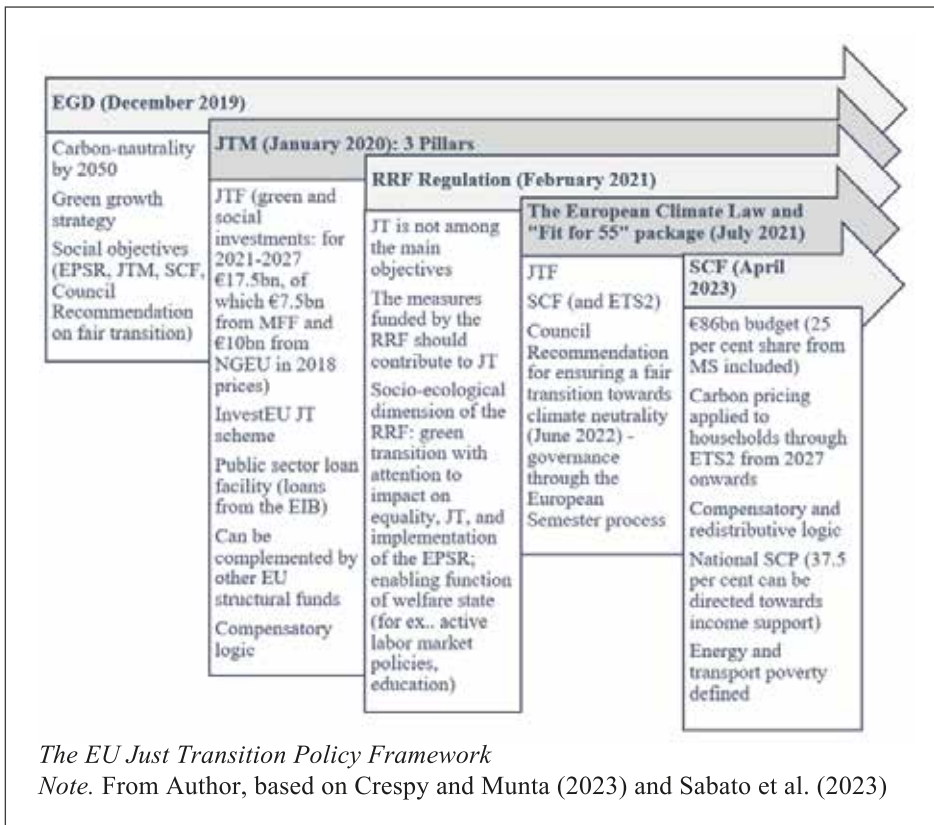
resulted from a political synthesis involving compromises between the EU institutions and member states (Charveriat, 2023; Crespy & Munta, 2023). According to Hoon and Pype (2022), theoretically, the EGD should be contextualized in three main discourses: the concept of the just transition as proposed by the international labor organizations, the so-called “Green New Deal (GND) economics” of the 1990s, and the principles of liberal market economics (pp. 7-8). The GND strand of economics maintains that every sound economic policy must include social and ecological objectives. As in “Franklin D. Roosevelt’s New Deal, GND economics suggest a government-led investment plan that, especially in times of crisis, can generate secure and quality employment through efforts to improve public infrastructure and welfare standards” (p. 7). Such an approach rests on the same assumptions as the green growth vision, which, contrary to degrowth economics (Hickel, 2020; Šiaudvytienė, 2023), sees economic growth and development as vehicles for social and ecological justice. Finally, with its reliance on carbon pricing as the main instrument to achieve economic and societal adjustment, the EGD “trusts in the free market to adjust and react to price incentives, to transition to a zero-emission economy without changing its foundations” (Hoon and Pype 2022, p. 8).

In the EU context, the idea of the just transition is not new. According to Matthieu (2022), back in 1951, “the European Coal and Steel Community created a ‘Fund for the training and redeployment of workers’” (p. 154), which could have inspired European just transition proposals in the environmental sphere in the same way as Mazzochi’s proposed just transition idea in the 1970s was inspired by the “Superfund for workers”. However, in Europe, the idea of a just transition did not receive more attention because of the increasing dominance of market liberalism in the development of the EU project. The idea of the just transition appeared on the EU policy agenda again and was introduced into the EGD thanks to the international labor movements, which brought it from the US context to the

level of international organizations. After the just transition was embraced by the ILO and recognized in the Paris Agreement, “it found its way into the EU’s Energy Union and a newly created Platform for Coal Regions in Transition in 2017” (Matthieu 2022, p. 154). Right after that, the European Parliament proposed a Just Transition Fund in 2016 and reiterated it in 2018, within the framework of the Multiannual Financial Framework for the period 2021–2027. Then, a just transition policy was approved and the EGD adopted by the Council in December 2019 (Marty 2020).

2. Comparing the ILO’s and the EU’s Just Transition Approaches

Since the concept of just transition in the EU emerged from the context of international organizations and especially from the Paris Agreement and the ILO’s agenda, it “show[s] a certain degree of correspondence with the main elements of the just transition framework proposed by the ILO in their 2015 Guidelines” (Sabato and Fronteddu 2020, p. 15). However, the EU’s vision of just transition differs from the ILO’s approach in some significant ways. In general, according to Crespy and Munta (2023), “the EU’s vision is far less ambitious than that promoted by the ILO in three main respects: the underlying philosophy, the policy-making tools, and the political processes” (p. 4). The authors point out that, regarding the philosophy, the ILO promotes a just transition centered on distributive and procedural justice. In contrast, the EU’s just transition framework has no real options for citizens to participate. It is formed and implemented from the top and seems worried only about a possible political backlash. Looking at policy-making, the ILO’s vision of a just transition embraces a comprehensive and integrated approach and aims to bring together different levels of action (local and global) and policies in areas like the economy, society, and the environment. On the contrary, the EU just transition notion is a part of the EGD strategy, “conceived as a new growth model meant to be sustainable from an environ-



mental point of view” (ibid.). Therefore, the specific policies came later, and the EU’s transition policy framework (as illustrated in Figure 1) is still in the making and “gradually emerging, made up of legislation, funds, guidelines and recommendations” (Sabato *et al.* 2023 p. 20). Finally, regarding political processes, EU just transition politics does not demonstrate social consensus, as recommended by the ILO, but is characterized by heated debates over the allocation of national funds, the green taxonomy, and many other essential aspects of the EU just transition policy.

Another comparison between the ILO’s and the EU’s approaches to just transition can be made using the distinction in Alcidi *et al.* (2022) between a compensatory and an integrated logic that can underpin eco-social policies. In the compensatory logic, “social policy objectives and tools are linked to environmental objectives and tools only by the extent to which the latter produces negative externalities.” While in the integrated logic, “social policies and goals are designed together with ecological objectives and goals” and welfare policies “do not only compensate for the social costs of the green transition but they are also conceived

as a necessary pre-condition to facilitate the ecological transition” (p. 188). According to Crespy and Munta (2023), the majority of the EU just transition policies are characterized by compensatory logic since they target “narrow groups of transition ‘losers’” (p. 4). On the other hand, the ILO’s approach is guided by an integrated logic.

3. Components of the EU’s Just Transition Policy

As mentioned earlier, the EU’s just transition framework is steadily taking shape by introducing new initiatives over the years (Sabato & Mandelli, 2023). This framework has three main components: the Just Transition Mechanism, the Social Climate Fund under the “Fit for 55” legislative package, and the Council Recommendation on Fair Transition (Council of the European Union, 2022). Furthermore, the EU’s recovery from COVID-19 agenda, known as the Recovery and Resilience Facility (RRF), plays a significant role in supporting the EU’s just transition policy, even though it is not its primary objective.

Besides transforming Europe into the first climate-neutral continent by 2050, the EGD also has social objectives and aims to achieve a just transi-

tion. It promises to “leave no one behind” (European Commission 2019, p. 16) and address the social and economic consequences of the green transition. As part of the Sustainable Europe Investment Plan (SEIP) (also known as the European Green Deal Investment Plan), the Commission introduced the Just Transition Mechanism (JTM) in January 2020, embedded in the cohesion policy and serving as a central tool to fulfill the social objectives of the European Green Deal (EGD). The JTM initiative has three pillars: a Just Transition Fund (JTF), “the use of a fraction of InvestEU financing for climate objectives and the creation of a public sector loan facility at the European Investment Bank, partly guaranteed by the EU budget” (Cameron *et al.* 2020, p. 10). At the same time, in a communication entitled “A Strong Social Europe for Just Transitions” (European Commission, 2020), the EU made its first attempt “to connect EGD governance with existing social policy instruments, especially the European Pillar of Social Rights (EPSR)” (Crespy and Munta 2023, p. 3), even though, the EPSR addresses socio-ecological problems only minimally. In general, the implementation of the EGD is now driven by the already mentioned “Fit for 55” package, which was proposed by the European Commission in July 2021 and adopted by the European Parliament and the Council of the EU in April 2023. It refers to the EU’s target of reducing net greenhouse gas (GHG) emissions by at least 55% by 2030. In it, the JTF and the Social Climate Fund (SCF) specifically address the problems of inequality and social justice related to decarbonization in the EU.

3.1 The Just Transition Mechanism

The core pillar of the Just Transition Mechanism is the Just Transition Fund (JTF). The JTF has a budget of €17.5 billion (calculated based on 2018 prices) for 2021-2027. This allocation comprises €10 billion from the Next Generation EU (NGEU) program and €7.5 billion from the multiannual financial framework (MFF) for 2021-2027. The JTF

“focuses on the regions that are most affected by the transition given their dependence on fossil fuels, including coal, peat and oil shale or greenhouse gas-intensive industrial processes, and that have less capacity to finance the necessary investments” (European Commission n.d., para. 6). In order to access funding from the JTF, Member States must commit to the 2050 EU climate neutrality target. If a member state does not make this commitment, “only 50% of the annual allocations for that Member State [...] shall be made available for programming and included in the priorities” (European Union 2021a, art. 7.1). Additionally, member states have to prepare their Territorial Just Transition Plans (TJTP), based on the principle of partnership with local and regional governments and relevant stakeholders and submit them to the European Commission. These plans should identify the eligible territories expected to be the most negatively impacted by the transition to a climate-neutral economy and “outline the specific indicators intended to contribute to the selected JTF objectives” (Crespy and Munta 2023, p. 7). The JTF can be complemented by other structural funds such as the Cohesion Fund, the European Social Fund+ and the European Regional Development Fund.

Article 8 of the JTF Regulation lists the eligible activities the fund will support. These activities can be divided into green investments, which aim to diversify and modernize local economies, and social investments, which should help mitigate the negative repercussions of the transition on employment. As for the first category, the JTF Regulations mention investments in economic diversification, new businesses, research and innovation, clean energy infrastructure, energy efficiency, smart and sustainable local mobility, digitalization, the circular economy, water decontamination, and land restoration. On the other hand, the JTF-funded social activities include the upskilling and reskilling of workers and job seekers, job-search assistance, the active inclusion of jobseekers, technical assistance, investments in infrastructure for training centers, child- and elderly-care facilities, gender equali-

ty, exceptional attention to vulnerable groups (such as disabled workers), and the reduction of energy poverty. Furthermore, Article 9 of the JTF Regulations lists activities that will not be funded: the decommissioning or the construction of nuclear power stations; the manufacturing, processing, and marketing of tobacco and tobacco products; and investments in fossil fuels.

While the governance of the first pillar happens through shared management between the EU and member states, the other two pillars of the JTF are managed directly by the EU institutions and implementing partners (CEE Bankwatch Network, 2023). They include just transition initiatives within InvestEU and a public sector loan facility, integrating member state co-financing, EU grant support, and European Investment Bank (EIB) loans. The second pillar,

the InvestEU program, seeks to foster sustainable investment, innovation, and job creation in Europe by leveraging a EUR 26.2 billion EU budgetary guarantee to support implementing partners such as the EIB Group, national development banks, and others, aiming to catalyze €372 billion worth of investments during the 2021 to 2027 funding cycle, from which about €10-15 billion is expected to be mobilized through a dedicated Just Transition Scheme (CEE Bankwatch Network, 2023). InvestEU supports investments in four policy windows: “sustainable infrastructure; research, innovation and digitisation; SMEs; and social investment and skills” (European Union 2021a, rec. 27). Furthermore, the InvestEU Just Transition Scheme (JTS) funds projects only in these territories, and in these sectors and activities that are listed in the relevant TJTPs, prepared



in order to receive funds from the first pillar of the JTM. Projects not located in the Just Transition (JT) regions will be able to benefit from the InvestEU JTS “if funding of the project is key to the development of a JT region” (Chraska 2023, p. 5).

To conclude, the second pillar of the JTM differs from the first in its sources of funding, as well as in its scope of support. The JTF’s “main emphasis is on counteracting negative economic impacts of the green transition in carbon-intensive regions – like unemployment, brain drain, and social issues – through economic diversification, reskilling workers and actively including workers and jobseekers” (CEE Bankwatch Network 2023, 4). On the other hand, the InvestEU JTS will support “a broader range of projects, including renewable energy sources, energy efficiency schemes, energy and transport infrastructure, gas projects, district heating, decarbonisation, social infrastructure and economic diversification” (ibid.). Unlike the other 2 JTM pillars, the InvestEU program allows fossil-fuel-related investments.

The third pillar of the JTM, the public sector loan facility, “is made up of EUR 1.5 billion in grants from the EU budget and EUR 10 billion in loans from the EIB Group”, which “should be used together” (CEE Bankwatch Network 2023, p. 3). The public loan facility will predominantly fund significant infrastructure projects carried out by public authorities that lack adequate revenue streams for commercial financing, and these projects typically include energy and transport, district heating, energy efficiency (including building renovation), and social infrastructure initiatives (European Commission, n.d.-b).

3.2 The Social Climate Fund

The second instrument of the EU just transition policy framework is the Social Climate Fund (SCF). The European Commission put it forward in July 2021 as a component of the “Fit for 55” package, scheduled to commence in 2026. The SCF was proposed only after the adoption of

the European Climate Law in 2020 as a response to “widespread criticism that the Commission failed to provide adequate support for more vulnerable consumers who could face the greatest difficulties in managing high energy costs” (Matthieu, 2022, p. 158). The SCF Regulation (European Union, 2023) was approved in April 2023. The SCF builds upon the Emissions Trading System (ETS) by expanding it to encompass buildings and transport systems (ETS2). This extension will introduce carbon pricing for households beginning in 2027, leading to a potential price increase.

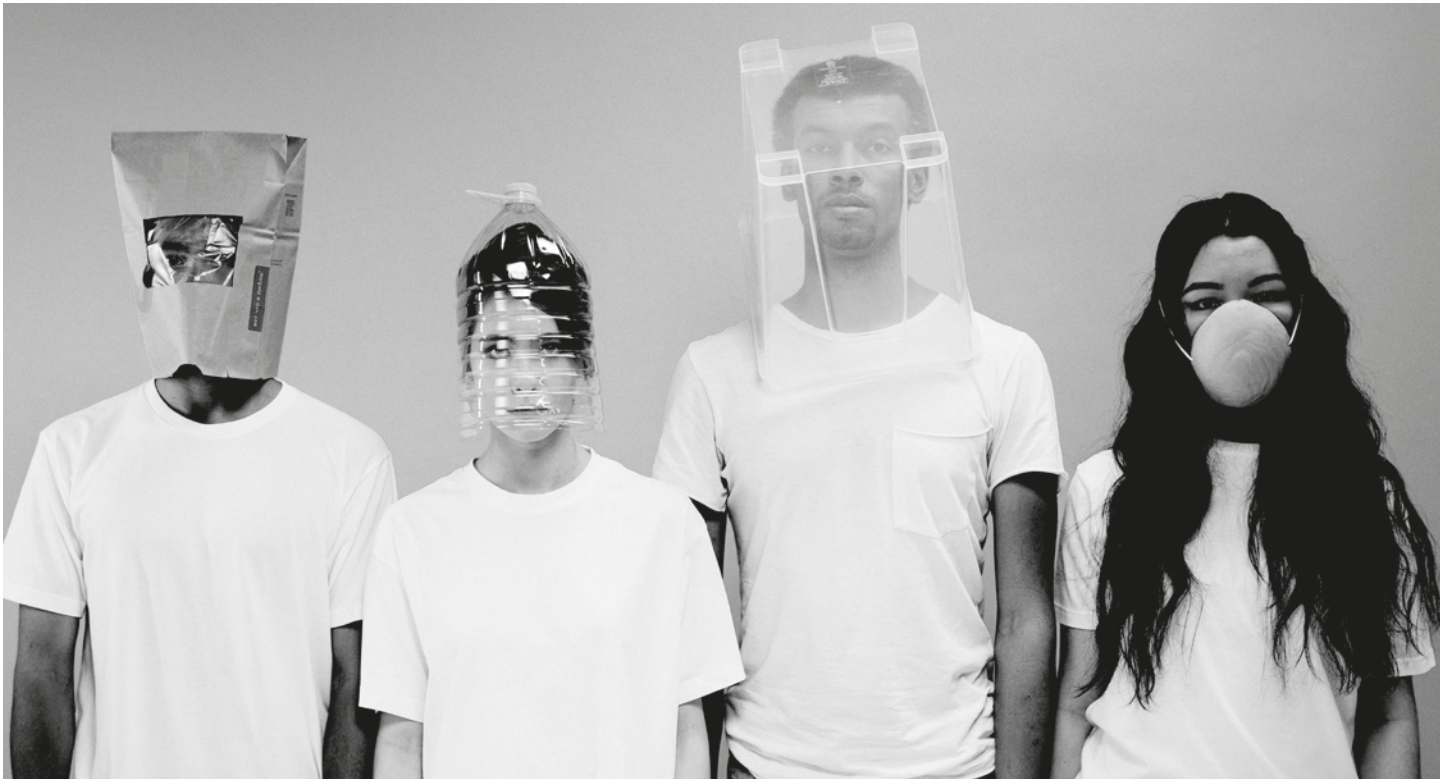
Consequently, the SCF will offset “the negative impact on the most vulnerable individuals and small companies by providing resources for Member States to grant direct income support and fund investments in clean housing and transport” (Crespy and Munta 2023, p. 10). Moreover, the SCF Regulation provides the first institutional definition and usage of energy and mobility poverty concepts. The agreed budget for the SCF is €65 billion, and an additional share of 25% from member states must be added, resulting in a total budget of €86 billion.

In order to access the funding from the SCF, the EU member states will need to prepare their national Social Climate Plans (CSPs) with “qualitative ‘milestones’ and quantitative ‘targets’ [...] to be achieved by July 2032” (Crespy and Munta 2023, p. 11). The drafting of the CSPs must happen after consultations with “local and regional authorities, economic and social partners, and civil society” (Sabato et al., 2023, p. 24). According to the SCF Regulation, each CSP should “contain a coherent set of existing or new national measures and investments to address the impact of carbon pricing on vulnerable households, vulnerable microenterprises, and vulnerable transport users in order to ensure affordable heating, cooling, and mobility, while accompanying and accelerating necessary measures to meet the climate targets of the Union” (European Union 2023, art. 4.1). Hence, the SCF is both, compensatory and redistributive: it will provide (temporary) direct

income support (at the beginning – up to the maximum of 37.5% of the available funding) as well as help “vulnerable households, vulnerable micro-enterprises, or vulnerable transport users” (art. 6.1e) with long-lasting structural investments in “technical measures to mitigate environmental risks” (Crespy and Munta 2023, p. 10), such as energy efficiency, building renovations, zero- and low-emissions mobility and transport, and decarbonization. Finally, in Annex I, the SCF Regulation lists the criteria for allocating the funding to member states. They include the population at risk of poverty living in rural areas (2019); carbon dioxide emissions from fuel combustion by households (2016-2018 average); the percentage of households at risk of poverty with arrears on their utility bills (2019); total population (2019); the Member State's gross national income (GNI) per capita, measured in purchasing power standard (2019); and the country's dependency on fossil fuel. Thus, the SCF seeks to address inequalities within and between countries.

3.3 The Council Recommendation on a Fair Transition

The third component of the EU just transition policy framework is contained in the 2022 Council Recommendation on ensuring a fair² transition towards climate neutrality (Council of the European Union, 2022). The EU introduced this non-binding social initiative, responding to criticism about the weakness of the EGD social dimension and the fragmented nature of the EU's just transition efforts. Hence, the Recommendation repeats the principle that nobody should be left behind in the transition to sustainability and identifies the “people and households that are most affected by the green transition, notably by job losses but also by changing working conditions and/or new task requirements on the job, as well as those subject to adverse impacts on disposable incomes, expenditure, and access to essential services” (Council of the European Union 2022, rec. 17). Importantly, the document invites



policymakers to pay special attention to people “who are already vulnerable (i.e., irrespective of the transition), such as low- and lower-middle income households” (Sabato *et al.* 2023, pp. 24-25), people living in or at risk of energy poverty and mobility poverty, and “households headed by single parents” (Council of the European Union 2022, rec. 17).

Furthermore, the Recommendation on fair transition calls for member state governments to adopt a more integrated and participatory approach towards the just transition, which is somewhat closer to the ILO’s Guidelines for a just transition. It states that there is a need to “enhance the design of policies in a comprehensive and cross cutting manner and to ensure the coherence of spending efforts, at Union and national level” (Council of the European Union 2022, rec. 16). As summarized by Sabato *et al.* (2023), all well-designed fair transition “policy packages should include measures ensuring: i) active support to quality employment; ii) quality and inclusive education, training and lifelong learning, as well as equal opportunities; iii) fair tax-benefit systems and social protection systems, including social inclusion policies; and iv) access to affordable essential services and housing” (p. 25). The Recommendation indicates

that the progress of its implementation will be reviewed “in the context of multilateral surveillance in the European Semester” (Council of the European Union 2022, art. 11g), which is the European Union’s framework for the coordination and surveillance of economic and social policies (European Commission, n.d.-a). This review involves collaboration with relevant committees of the Council of the EU, such as the Employment Committee (EMCO) and the Social Protection Committee (SPC), along with other committees in their respective areas of expertise, like the Economic Policy Committee (EPC). According to the Recommendation, it should build upon existing scoreboards and monitoring frameworks, and additional indicators may be included, if necessary, with close cooperation with member states.

3.4 The Recovery and Resilience Facility

The fourth element of the EU just transition policy framework is the Recovery and Resilience Facility (RRF). A just transition is not the primary goal of the RRF. However, according to the RRF Regulation (European Union, 2021), the member states must guarantee that the measures financed by the Facility contri-

bute to achieving a just transition. The RRF is organized into six core policy areas (pillars) essential for recovering from the COVID-19 crisis and for strengthening the EU and its member states’ long-term resilience. The policy pillars illustrate environmental (green) and societal (social) aspects within the RRF; these two dimensions sometimes intersect. Hence, the socio-ecological dimension of the RRF can be identified when member states are obligated to consider the social aspects and equality impacts during the implementation of the green transition, requiring them to allocate a minimum of 37% of the RRF expenditure to green transition measures in their Recovery and Resilience Plans (RRPs). The RRF also requires that the national RRFs contribute to “the implementation of the European Pillar of Social Rights” (European Union 2021, rec. 39).

Furthermore, the RRF highlights the importance of active labor market policies, education, training, and skills development policies and connects them to the implementation of the green transition. Next, in the RRFs, “building-renovation schemes to improve energy efficiency should include welfare infrastructure such as social housing, hospitals, schools, and other public buildings” (Sabato *et al.* 2023, p. 22).

Concluding Observations

Summarizing the scholarly observations about the EU just transition policy framework, several points of concern can be mentioned. First, despite the very inclusive vocabulary of the EU's political discourse (Andersen et al., 2023), analysts find the EU approach to the just transition too narrow (Guillén & Petmesidou, 2021), restricted to the specific industries, groups, and territories most affected by decarbonization (as in the JTF), and not “to meet the vast social (and health) impact of the climate crisis on whole societies and to ensure social equity and inclusiveness” (Crespy and Munta 2023, p. 8). Therefore, so far, the EU's transition agenda seems fragmented and does not “offer the comprehensive policy platform that the EU needs to deal with the impacts of the transition on affected workers, regions and vulnerable individuals” (Akgüç et al. 2022, p. 1), and leaves significant aspects regarding inequality and the distribution of environmental risks unaddressed. According to Sabato and Fronteddu (2020), this also happens because the EGD sets “no clear priorities among environmental, economic, and social should trade-offs arise” (p. 13) and follows an economic framing (Cigna et al., 2023). Second, even though EU just transition policy regulations call on the member states to apply a participatory approach in designing and implementing just transition policies, it is not mandatory. Consequently, just transition policies are often seen as implemented following the EU top-down

approach. Lastly, the Recommendation on fair transition, while endorsing a more integrated approach, is non-binding, and its monitoring relies on the European Semester, a tool that has not been reformed adequately to monitor the implementation of just transition policies effectively

Consequently, in further developing the EU's just transition policy framework, it will be crucial to broaden the scope and inclusivity of the policy and address the broader impacts of the climate crisis and the green transition. Moreover, the EU's just transition policy would significantly improve if made more comprehensive, aligning well with one of the objectives of the Belgian Presidency of the Council in the first half of 2024. Next, as recommended by the ILO, a just transition should extend beyond strict economic framing and incorporate the social and health impacts of environmental policies more effectively. Such a way of seeing would imply, for example, a more robust integration of these impacts into the policy framework. Finally, it would also necessitate a discussion about strengthening the binding nature of the EU's just transition policy and establishing effective mechanisms for the monitoring of its implementation.

NOTE

In the EU vocabulary, “green transition” means “the transition of the Union economy and society towards the achievement of the climate and environmental objectives primarily through policies and investments, in accordance with the European Climate

Law [...], the European Green Deal and international commitments” (Council of the European Union, 2022). Here “the climate and environmental objectives” refer to climate change mitigation; climate change adaptation; the sustainable use and protection of water and marine resources; the transition to a circular economy; pollution prevention and control; and the protection and restoration of biodiversity and ecosystems that are listed by Regulation (EU) 2020/852 (European Union, 2020).

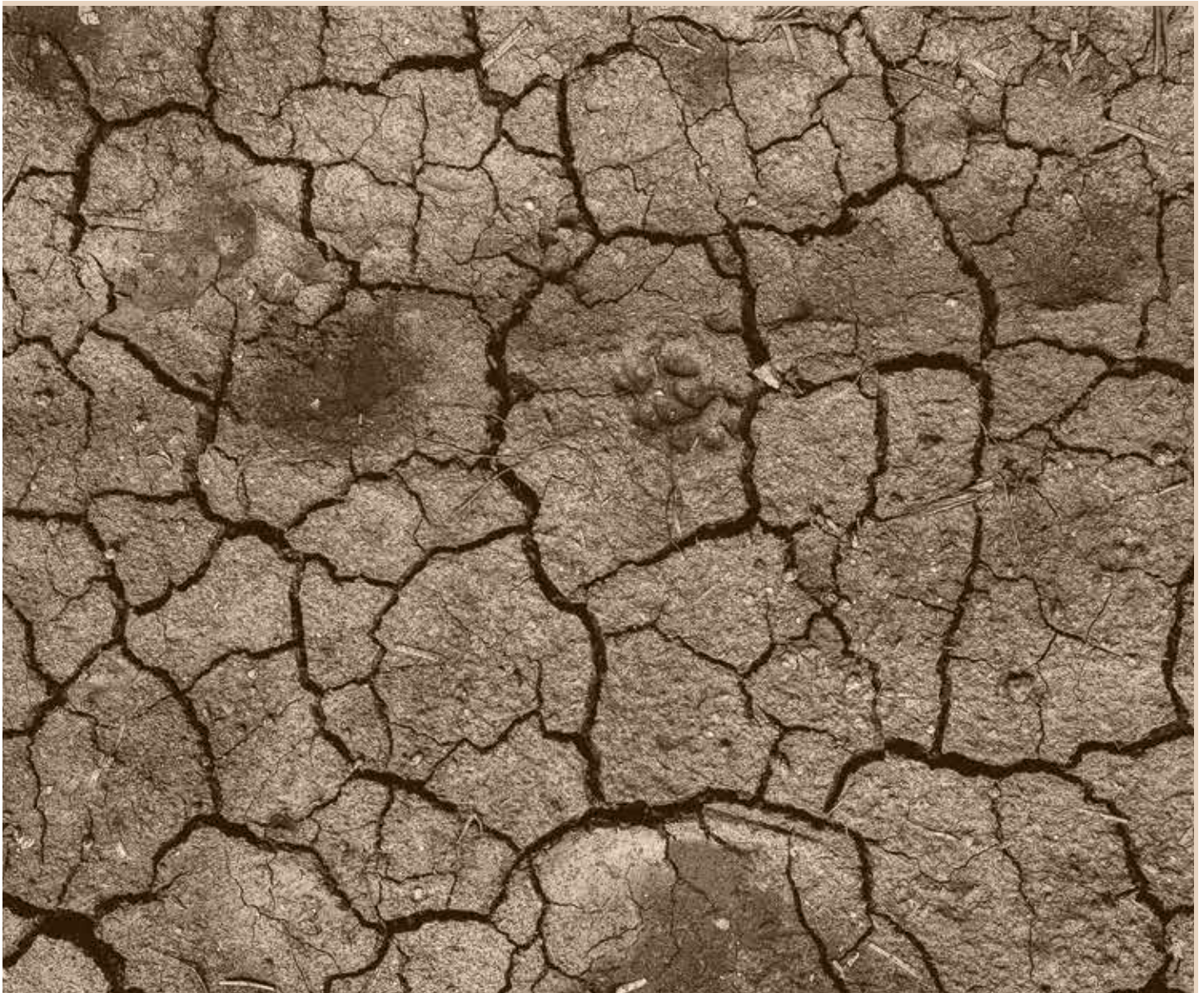
Traditionally, international organizations and actors, the EU included (the EGD, for example), have used the term ‘just’ transition. However, in the recent Council Recommendation on ensuring a fair transition towards climate neutrality, the EU started to refer to ‘fair’ transition instead. According to Sabato et al. (2023), “according to interviews conducted with European Commission officials, ‘just’ and ‘fair’ transition has the same meaning: the latter notion was introduced in order to better align just transition (from a terminological point of view) with the ‘fairness’ dimension of ‘competitive sustainability,’ a notion central to EU socio-economic governance since 2020” (p. 7). On the contrary, Tomassetti (2022) does not agree that the change of the term was unintentional, criticizes the EU for “misciting the content of existing policy documents” (para. 3), and claims that the discourse on fairness may be subject to manipulation or lack meaningful discussion if justice is not taken into account as a fundamental principle of coexistence. In this chapter, both terms will be used interchangeably.



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SPAZIO APERTO

OPEN SPACE

«Se dovessi riassumere il senso del mio insegnare e lavorare, potrei dire: ho cercato di contribuire a che il Dio cristiano possa fare bella figura nella storia del pensare ed agire umano, e di chiedermi perché questo risulti tanto difficile». (Elmar Salmann, monaco benedettino, * 1948)

L'ATISM Associazione Teologica Italiana per lo Studio della Morale fu fondata a Pasqua del 1966 a Napoli, da Dalmazio Mongillo, Domenico Capone e Tullo Goffi.

1. Non so se Giannino abbia partecipato a questo primo incontro, ma nel secondo Congresso Nazionale nel 1968 ad Assisi (*Libertà – Liberazione nella vita morale*) Giannino c'era (ed anch'io allora studente di P. Mongillo all'Angelicum).

Fu il congresso di Ambrogio Valsecchi, che insieme a Leandro Rossi avrebbe presto preparato la prima edizione del Dizionario di Morale della S. Paolo: *Dizionario enciclopedico di teologia morale*, con Leandro Rossi, Paoline, 1973.

A questo dizionario, comunque, Piana, che iniziava ad insegnare a Novara e a Milano, partecipò con la voce: *Libertà*.

2. Giannino fu figura centrale dell'Associazione nei primi decenni: come segretario Atism dal 1975 al 1984, e come Presidente dal 1984 al 1992. Giannino Piana: «Un periodo assai difficile per una situazione conflittuale creatasi tra teologia morale e magistero (della chiesa italiana in particolare); ma soprattutto per la necessità di dare vita al rinnovamento voluto dal Concilio... vennero in quegli anni fatto oggetto di studio, sia nei congressi nazionali che negli incontri regionali... le questioni di fondo della teologia morale: dalla specificità della teologia morale all'ermeneutica della legge morale; dal significato della legge naturale al primato della coscienza morale, fino al problema dell'*intrinsic malum*».

(Cf Paolo Carlotti, *La teologia morale italiana e l'ATISM a 50 anni dal Concilio: Eredità e futuro*, Cittadella Editrice, Assisi 2017. pp. 421-425 *Incontro coi presidenti emeriti*).

Conservo ancora due sue lettere del

La figura del prof. Piana nelle vicende della teologia morale in Italia, in particolare il cammino dell'Atism¹

Francesco Compagnoni

1976/77 di Giannino che mi scriveva a Friburgo per organizzare un gruppo di studio del Congresso ATISM imminente a Zafferana Etnea: *La fondazione della norma morale e marxista contemporanea*, aprile 1977).

3. Lo incontrai di persona la prima volta alla Facoltà Interregionale di Milano (quella di Carlo Colombo, Pino Colombo, Cipriano Vagaggini, Tullo Goffi, Mons. Franco Fistorazzi e del giovane Giovanni Ferretti) agli inizi degli anni '70: io facevo il dottorato e Giannino, che era più vecchio di me di 15 mesi, veniva già trattato come un giovane talento che la Facoltà cercava di ingaggiare stabilmente come docente.

In seguito ci incontrammo spesso a Bologna dai Dehoniani di Lorenzetti per la direzione della *Rivista di Teologia Morale* fondata nel 1972. Giannino vi rappresentava con tranquillità e decisione il rinnovamento della teologia morale cattolica in Italia, non solo della sua decostruzione, bensì della sua ricostruzione.

In seguito abbiamo diretto insieme le edizioni del 1989 e del 2019 del *Dizionario di morale*. Nelle numerose sedute di preparazione Piana assumeva spesso una posizione di mediazione tra due estremi.

4. Perché, dato i miei limitati meriti come teologo, Giannino mi abbia costantemente coinvolto direttamente in tanti suoi lavori editoriali o di conferenze, non saprei proprio dire. Tra l'altro sono stato dagli anni '80 suo successore presso l'*Ut Unum Sint*, primo istituto italiano di insegnamento teologico per corrispondenza/a distanza. Forse perché avendo io una forte formazione tomista ed insieme una apertura alla modernità sentiva una certa assonanza tra i nostri discorsi.

Lui però rappresentava la svolta ermeneutica, francofila: Luigi Pareyson, per indicazione di Giannino stesso, fu il suo iniziatore a tale prospettiva ermeneutica.

Mentre io avevo imboccato una svolta linguistica-analitica, oltre che germanofila (insieme a Salvatore Privitera, geniale prete di Acireale).

Entrambi eravamo contrari alla meto-

dologia dei manuali di teologia morale diffusissimi fino al Concilio, ma penso per ragioni parzialmente diverse, e con esiti chiaramente diversi.

Delle sue prese di posizione sul referendum per il divorzio e l'aborto, potete leggere sulla sua autobiografia intellettuale che ho potuto pubblicare nel volume a lui dedicato: *UN'ETICA PER TEMPI INCERTI - GIANNINO PIANA TEOLOGO ITALIANO* Cittadella 2021.

In questa raccolta di saggi a lui dedicati ho analizzato il suo metodo di lavoro della maturità nel mio saggio ivi apparso sul suo concetto di Coscienza. Il suo metodo fondamentale era quello di prendere le posizioni tradizionali cattoliche - non quelle manualistiche però, direi piuttosto quelle tomiste aperte - di contrapporvi gli sviluppi e sfide moderne-contemporanee, e di cercare in seguito una mediazione sulla linea ermeneutica alla Paul Ricœur. Aveva spesso riferimenti alla psicanalisi, all'economia e alle scienze politiche. Fondamentalmente era per il rinnovo delle istituzioni ecclesiastiche e per una presenza sociale della chiesa che non fosse conservatrice.

5. Il grande merito di Piana è stato, nei suoi decenni, quello di aver affrontato le sfide multiformi della teologia e della chiesa italiana. Altri "innovatori" vedevano le stesse cose ma non sapevano proporre pubblicamente soluzioni socialmente viabili. Il mio maestro D. Mongillo ed io stesso restavamo ai discorsi di fatto solo teoretici.

Per me è la stessa situazione con Papa Bergoglio: affronta i problemi e propone soluzioni, che non sempre sono condivisibili. Ma chi ha soluzioni migliori si faccia avanti! Piana e Bergoglio hanno proposte sul *divorzio*, *l'aborto* e *i matrimoni omosessuali* che io non riesco a condividere; ma io non saprei come risolvere questi tre maxi problemi sociali che sono più che reali. Anche il loro distanziamento dalle *strutture ecclesistiche* per me fa problema, perché ritengo che senza strutture stabili la presenza sociale di una comunità sia a rischio

continuo di scomparire.

Fondamentalmente la mia difficoltà ad accettare queste soluzioni “progressiste” nella pratica consiste nel fatto che mi sembra che non tengano affatto in conto la ricaduta sociale ed educativa di queste scelte puramente riservate alla coscienza dei singoli. Ma la mia riserva potrebbe anche dipendere a diversità di temperamento e disposizione al rischio da parte loro e mio.

In questo senso io sono con loro, perché essi hanno cercato e cercano di influenzare gli eventi sociali, mentre altri colleghi che li criticano non sono in grado di farlo. Piana e Bergoglio sono nell’agone sociale ed ecclesiale, qualche volta sono troppo aperti alla modernità, ma senza dialettica non si ha progresso né teoretico né sociale. Senza di loro nel campo della teologia morale saremmo ancora ai manuali scritti (ed insegnati) da dottori in diritto canonico: uno degli effetti dell’impatto del Codice canonico del 1917 sulla nostra disciplina. Ma, di contro, se non teniamo conto dell’impatto sociale delle nostre riflessioni e proposte, a chi insegneremo con i seminari e le facoltà teologiche già ora semivuote?

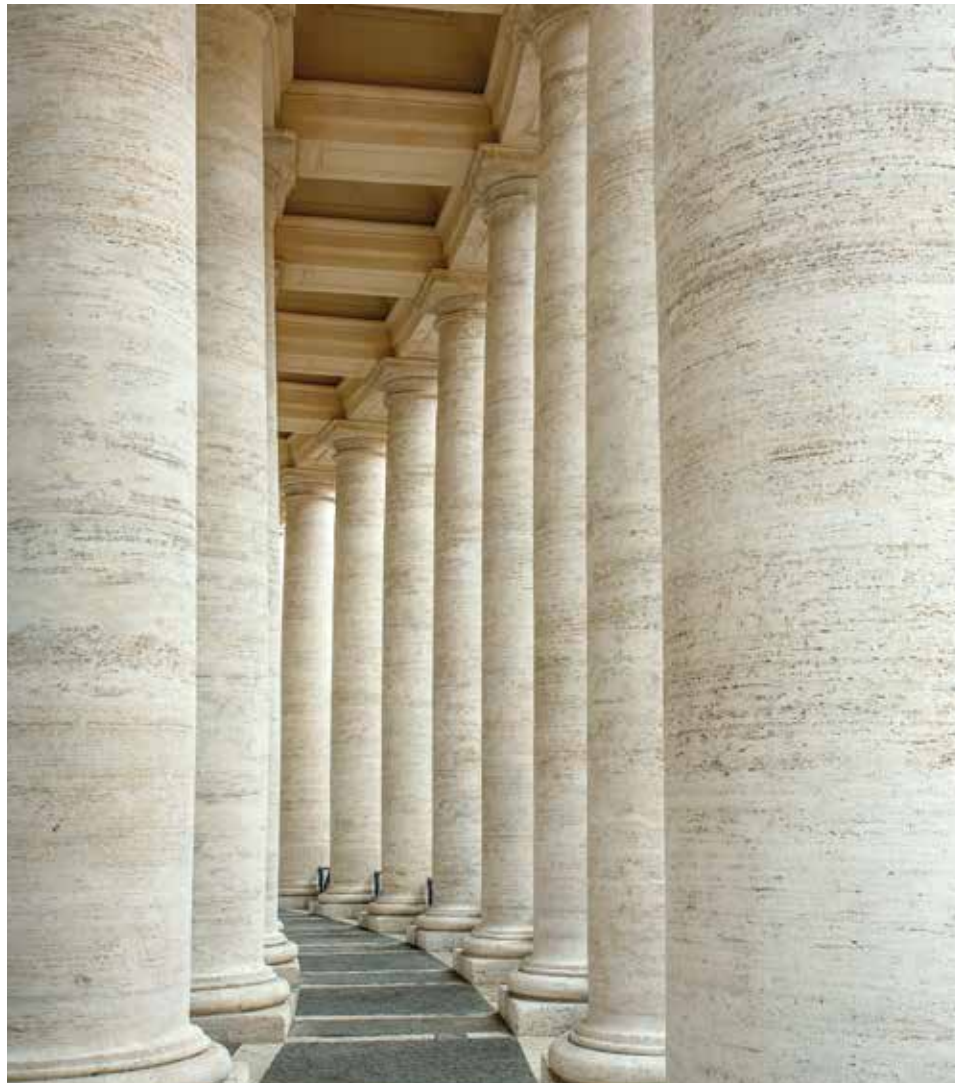
6. Piana era amico/consigliere di personalità come il Card Martini con il quale si incontrava regolarmente. Ha fatto viaggi con l’amico Enzo Bianchi, con il quale è rimasto in contatto fino alla fine. Senza dimenticare i suoi “compagni del Lombardo” come i cardinali Ravasi (che faceva riferimento a lui per la teologia morale anche sul domenicale de *Il Sole 24 Ore*), e il canonista Francesco Coppalmerio; ma anche il biblista Romeo Cavedo (perla nascosta a Cremona).

Soprattutto negli ultimi suoi anni ci siamo sentiti molto spesso (ogni 15 giorni) e parlavamo particolarmente di politica (ecclesiastica e civile). Ultimamente le sue posizioni erano vicine a quelle di Calenda.

Non abbiamo mai parlato della sua scelta personalissima di lasciare il ministero sacerdotale e lui stesso non ne parla nella sua intervista biografica di cui sopra.

Giannino è stato un uomo del suo tempo: direi per 40 anni è stato tra i più ascoltati teologi italiani e senza cercare lo scoop è stato costante nel seguire gli eventi e nell’essere seguito nelle sue prese di posizione della chiesa italiana. Soprattutto con conferenze e rubriche, ad es. su *Jesus, Rocca, il Gallo*, diffondeva questo suo metodo ed i suoi risultati.

È stato un uomo e un cristiano del suo



tempo, ma ha influito incisivamente sul suo tempo anche perché era un ottimo scrittore ed un fine polemist. Oltre ad aver insegnato la morale cattolica e centinaia di seminaristi e teologi, sia direttamente che attraverso il suo grande manuale edito dalla Cittadella: *In Novità di Vita*, in IV volumi, 2012-2016. Dove il suo metodo di lavoro sopra accennato è chiaramente adottato.

Era una persona gentile, anche se conscio del proprio valore intellettuale. Ma di questo non faceva un vanto: era invece una delle ragioni del suo impegno costante e deciso, teoretico e sociale.

7. Mi sia permessa, per chiudere, una citazione da una intervista recente del teologo tedesco Gisbert Greshake (*1933) *sulla perdita di importanza della teologia cattolica del suo paese*:

«Potrebbe anche avere a che fare con il fatto che la teologia di lingua tedesca ha avuto un enorme impulso teorico. Ciò significa che soprattutto i teologi più giovani credono di dover dimostrare scientificamente, soprattutto nelle università, di avere

un’elevata capacità di teorizzazione, anche rispetto ad altre scienze. Di conseguenza, però, si è persa la teologia come scienza che, in ultima analisi, deve servire la fede, che deve dischiudere il mondo della fede. Quello che sento ripetere sempre dagli studenti è che manca qualcosa nello studio della teologia, cioè che ne esca qualcosa per la loro fede personale. Per me questo ha a che fare con l’immensa priorità data alla teoria nella teologia di lingua tedesca.»

Questo errore Piana, pur nella serietà scientifica dei suoi testi, non lo ha mai commesso.

Ha servito la sua comunità di fede, locale e nazionale, e l’ha interpretata (*die Glaubenswelt aufzuschlüsseln*) per tutti noi in modo eccellente.

NOTE

Contributo alla «Giornata di studio in memoria di G. Piana», presso la Facoltà Teologica di Torino, 8 marzo 2024.

It is a great honour to be here; seeing you before me is a moving experience, reminding me of all that I have gained over the years through many encounters with Catholic universities around the world. So I'd like to begin with a world of thanks to you all, for all that your institutions have given me.

It seems to me providential that we celebrate the 100th anniversary year of IFCU this year, not 25 years ago nor 25 years from now. For it is at this moment in history, with its profound experience of a “polycrisis” in all its intricate dimensions, that the contribution of Catholic universities, through their teaching and outreach but especially through their research, has, perhaps, a uniquely important role.

I am saying this as a neophyte President of the Pontifical Academy of Social Sciences, founded only 30 years ago this year by Pope John Paul II, so quite young compared to IFCU, and who would like to use this chance to address you to talk about how we could work together for the good of the broken world around us. This means I will speak most directly about research in the field of the social sciences, but that will still allow me to make connections with the natural sciences and engineering or technology (Laudato si puts it well when it says: “We are faced not with two separate crises, one environmental and the other social, but rather with one complex crisis which is both social and environmental”, n.139 – let me add that our academy is working ever more closely with the older and bigger Pontifical Academy of Sciences for this very reason), but also to theology and philosophy, and the humanities more generally, since the crisis that we face requires us to rethink the foundations of our modern system (of which the social sciences are children) and for that we will need to draw on the resources of our theological and philosophical traditions. As John Paul II says it well in *Centesimus annus* (a good document to mention at IFCU's 100th anniversary): “The

Bringing Out of our Storeroom Treasures New and Old (Mt 13:52) The Catholic Tradition as a Source of Innovation in Research¹

Helen Alford



theological dimension is needed both for interpreting and solving present-day problems in human society” (n. 55).

Let's look at our title. We start with a phrase from Matthew which comes at a critical juncture in the Gospel story, as the attitude towards Jesus on the part of his hearers is starting to change, moving from one of amazement and expectation to one of “doubts, criticisms and overt hostility”, and in which the inner group of disciples becomes more important as the bearers into the future of His message in the face of rising opposition.² It completes what scholars call the “third major discourse” which is the 13th chapter of Matthew, including its seven parables of the word or the kingdom of heaven: the sower, the wheat and the tares, the mustard seed, the leaven in the dough, the buried treasure, the pearl of great price, and the fishnet or dragnet. Many of these parables focus on the littleness of the word or of the kingdom of heaven: it is a seed sown, the tiniest of all seeds; it must compete with the tares;

it is hidden like yeast in the bread dough; it is buried, even if it is treasure; it is just one pearl among the many. We could carry on examining this text, but I think we can already see the many parallels to the situation of research in the Catholic university of today: Christianity is facing rising hostility in the part of the world where it is most established; what we have to offer seems small in the face of today's challenges . . . and perhaps, like the inner group of disciples, the Catholic universities as bearers of the intellectual tradition of the Church are going to become more central to the Church's mission.

This text was also used in the opening paragraphs of the encyclical of John Paul II that we already mentioned, *Centesimus annus*, referring back to *Rerum Novarum* and the new things that could be gained from reflecting on it 100 years later: “The treasure is the great outpouring of the Church's Tradition, which contains “what is old” — received and passed on from the very beginning

— and which enables us to interpret the "new things" in the midst of which the life of the Church and the world unfolds" (n. 3). And he uses it too in *Ex corde ecclesiae*: "By research and teaching, Catholic Universities assist the Church in the manner most appropriate to modern times to find cultural treasures both old and new, *"nova et vetera"*, according to the words of Jesus" (n. 12). So, in the light of that brief reflection on the biblical text, which seems to be especially connected to Catholic universities and to a centenary celebration, let us turn to the question of our research, using the second part of our title as a guide: the Catholic Tradition as a Source of Innovation in Research.

I'd like to make three main points.

Firstly, we could start by looking at this question historically.

Can we see anywhere where the Catholic tradition has been ahead of later research results, showing that it could be a source of innovation?

I think we could find this over and over again, but to be brief, I just give you one example, which is to be found in the lecture given by Giuseppe Toniolo when, at age 28, he started his academic career giving his first lecture as a "libero docente" at the University of Padua in 1873, so 150 years ago now. Looking at it, we can see that it anticipates empirical research results that we were only able to obtain much later. His lecture, which looks at ethics as an intrinsic factor in economics, points out that mainstream economic theory starts from an inadequate view of the human person, on the basis of which, he can say:

“. . . there arose a complete system of economic doctrines, which, resting on a defective analysis of human nature, placed in private profit the only motive, the norm and sanction of human action, the key to all economic facts . . .”

He identifies what we could call three groups of factors that also influence economic outcomes, describing them in this way:

“These and other sentiments, which, together with the spirit of self-interest, have the same root in our souls, just as they necessarily influence the whole of man's activity, so they affect every social economic fact, which must therefore be considered

as the resultant of a bundle of component forces, in the context of which personal gain acts under the modifying influence of all the other impulsive causes.”

So let's look briefly at these three groups of factors in relation to the areas of research that are now producing results confirming the philosophical-based assertions he was already making 150 years ago.

The first set of factors he places under the general heading “the religious spirit”, one of which is the “feeling of honesty and fairness . . . which, in proposing a higher purpose to man's activity, informs and colours all its manifestations, and none is exempt from its influences”.

Today, we know from the results in the field of game theory, such as that of the “ultimatum game”, that people do act in economic transactions out of a sense of honesty and fairness, doing so freely and without any constraint to do so from law, and often taking a penalty in terms of immediate economic gain.

The second group of factors are grouped around what he calls the “the consciousness of one's own moral dignity . . . an impulse that in the individual often outweighs that of material interest”.

Here we could refer to the results from other work in the field of behavioural economics, some of which has been popularised by Dan Pink in his book “Drive”, showing that giving people economic incentives at work, except in very limited circumstances, tends to reduce their effectiveness, while chances to exercise “autonomy” and “mastery” – which we could see as linked to “the consciousness of one's own moral dignity” – have far greater positive effects.

Thirdly, he talks about “the most noble need for sociality . . . with all its manifold impulses”. Here, among the many empirical results that we could mention, perhaps the most impressive is the great volume of work now available on happiness. The “World Happiness Reports” show that, across the world – and therefore in a culturally independent way, or “below” the level of culture, at the level of the human being as such – when we are at low levels of income, increasing income increases happiness, which could be seen as consistent with

a self-interested view of economic motivation, but above a fairly low income level, increases in income no longer correlate in a straightforward way with increases in happiness, and the factor that correlates much better with increases in happiness is, as Toniolo predicts, rather the quality of one's relationships.

Overall, then, Toniolo's lecture gives us just one example of how Catholic thought can be ahead of research results and could illuminate the way forward along new and innovative lines of research.

With this in mind, then, we can move to our second point.

Is there something from our tradition that could illuminate us now, helping us deal with the “polycrisis” that we mentioned above that we face today? If the Catholic universities could help the world deal with this, we would be making a decisive contribution, one very much in line with the pontificate of Pope Francis.

I think one way to address this is to look at how Catholic intellectuals reacted to the nearest crisis to the one we are in now – the crisis of the 1920s and 30s, that is, at the time 100 years ago when IFCU was founded – when democracy and liberalism seemed to be collapsing and authoritarianism seemed to be going from strength to strength. Catholic thinkers like Jacques Maritain, Emmanuel Mounier and Gabriel Marcel, among many others, developed the idea, or movement, or approach – there are various words for it – called “personalism”. In the face of the collapsing world order around then, they focused on the question of “who is man?” or “who is the human being?”, identifying in the individualism of modern liberal thought the underlying problem that needed to be confronted (let's not forget that it is individualism which also opens the door to the collectivism of totalitarian systems like Communism and Fascism).

Looking back, we could say that the personalism they started developing then, and which they were able to take so far but which now needs further development if it is to have a decisive impact, was a kind of “pilot project” for dealing with the crisis that we are in now.

For, in some ways, personalism had great success and influence; it was the main inspiration behind Christian

Democracy, which came to the fore in Europe after the totalitarian systems had been overcome, and was the major political force in Europe during the period of the “trente glorieuses” during which we had the only phase in history that we know about where there was fast economic growth coupled with low inequality, much lower inequality than we have now.

At the same time, Christian Democracy also demonstrated its weaknesses, and in particular, it was not able to resist the onslaught of neoclassical economic thinking – the Thatcher-Reagan revolution – from the 1980s onwards. I would suggest that this was at least in part because, although personalism had influenced political thought, there was no “personalist economics” that could have functioned as an effective counter to neoliberal economics. There is nothing to say, however, that such a personalist economics could not be developed – indeed, I think it’s one of the very things we should try to do in the face of our crisis.

For there is an argument to say that the problems we face now are not only of a similar kind to those faced by the

personalists in the 20s and 30s of the last century but, in some real ways, our problems are even more profound than theirs, demonstrated not least by the climate crisis. Furthermore, it is even clearer now than it was then that the fundamental problems we face, those that are at the root of our crisis, are largely social and systemic and that the individualistic mindset that we have inherited from modernity is too lacking and inadequate to help us find solutions to these problems.

We need a new philosophical (and, I would add, theological) framework, one that builds on modernity – in the sense that it still gives great importance to human freedom as modernity has done – but which allows us to go beyond the “collective action” problems we are constantly facing when we start from an individualistic view of the human being, and to recognize that we have shared objectives and goals that we can pursue together, building genuine common goods between us, and from which each one of us can also obtain the individual goods that we need. We need to find a new equilibrium between the exercise of personal freedom and the achievement

of shared goods. Personalism has the potential to help us with that.

Let me mention that the PASS has an upcoming meeting on the “social ontology” of Aquinas and the social sciences to help advance thinking along these lines.

And I am sure that there are many other initiatives that you are taking too. Let’s try to find a way to build our contribution together, in solidarity, creating a common good between us, together, one which is shared as much as possible with the wider university sector.

My third and last point refers to what we can offer the church. As universities, our first duty is to share and advance knowledge in our various intellectual disciplines, which is good for society as a whole as well as for the Church, but we also have a particular responsibility to the Church, to contribute to strengthening her and her mission. In speaking of the nature and mission of the Catholic university in *Ex corde ecclesiae*, Pope John Paul II cites a text of a meeting of Catholic universities in 1972, which I assume was an IFCU-sponsored meeting even if the footnote does not



mention who sponsored the meeting in question. The fourth of the four elements constituting the mission and identity of the Catholic university in this quotation is as follows: “an institutional commitment to the service of the people of God and of the human family in their pilgrimage to the transcendent goal which gives meaning to life” (n. 13).

Surely, there are many ways that we can do this. In my comments, however, I would like to continue considering what we can do as universities in relation to the work of the PASS, and on this front, I think a key contribution we can make to the Church is to help her become more “data literate”.

Not being able to use data in our day is like not being able to read, hence the term “data literacy”.

Just as the early Church thinkers used the leading “language” that they found around them, in Greek philosophy and Roman legal and moral thought, so we need to be able to use and speak the key language of the modern world, data, and translate into it what the Church has to offer the world.

Firstly, we need this for internal reasons. We need to be able to manage our institutions as well as possible, and in order to do that, we need to be able to evaluate where we are and set targets for where we want to go.

This inevitably brings us to the question of measurement.

Those of you here who are administrators in Catholic universities, perhaps the majority here today, will not need any convincing about the need for measurement, even if you will also be well aware that measurement can be used badly.

We know that we need to live in the tension between two phrases, both of which are true:

“If it isn’t counted, it doesn’t count”

“The things that really count can’t be counted”.

We know what happens to research when an unintelligent use of journal impact factors, research evaluation programmes and university league tables ends up putting academics in impossible situations where they resort to unethical means to achieve the unrealistic publication targets that they have been imposed on them.

IFCU is to be commended for the intelligent use of its Newman evaluation

system, helping Catholic universities to measure and improve their social responsibility without creating this kind of unhealthy competition, tending, as it does, towards corruption and plagiarism.

Nevertheless, within the wider Church I think we have the opposite problem. I have been told by theologians and philosophers in my university that “you can’t measure love”.

My answer to that is: you are right, we can’t measure love. But we can’t measure what a student has learnt in our courses either, so, if we adopt this line, then we really shouldn’t have exams either, since we know that they can’t measure what a student has really learnt.

This example shows us that the point of measurement is really very modest: it is not to make an absolute evaluation of the way things are, but to help us improve, step by step, allowing us to move from where we are now to something better.

And just as we change the way we evaluate students – giving them coursework to do, for instance, rather than evaluating them only on the basis of a final exam – so we can also change and improve the measures we use to evaluate where we are in running a parish, or a diocese, on the Roman curia.

However, I want to say that the question of data literacy is not so important as regards the internal management of church institutions as it is with regard to the external mission of the church and her work for evangelisation and promoting integral human development.

To put this in the kind of language we often hear today: we need to be able to tell our story better.

This is crucial for our work for human development, especially in developing countries, and, in a similar way, it is crucial for evangelisation, especially in rich and secure countries.

The simplest way to put this is to say: go out onto an average state university campus, or just go out onto the street, and stop someone to ask them: “what do you think of when you hear the words “Catholic Church”?”

What would they say?

Instead of saying “paedophilia, financial corruption and holding back progress, especially of women”, they could be saying “the biggest provider of education in sub-Saharan Africa, the

most global education system in the world, one of the major providers of AIDS care”, and so on.

Just after Pope Francis was elected, people who weren’t Catholic said to me: “Pope Francis has revolutionised the Catholic Church”.

I said to them “He hasn’t revolutionised anything. He is making visible to you a face of the Catholic Church you never saw before. You didn’t see it and you didn’t think it existed, but it did”.

We need to make sure that people can see all those faces of the Catholic Church, and one way to do it – one way in which the Catholic universities can play a crucial role – is by telling our story using data.

Let me give you two examples – one already existing; one that could be developed.

1. The “Global Catholic Education Reports”; and the “Global Integral Human Development Report”, a new initiative developed by Quentin Wodon in UNESCO, with the support of IFCU and other international Catholic education networks, using data collected by the Vatican Statistical Office, and available at <https://www.globalcatholiceducation.org/>

I have already been able to use these reports to support the British Embassy to the Holy See in its efforts to get the UK government to work much more with Catholic education and Catholic healthcare in its overseas development aid efforts, especially in relation to the most vulnerable, or “fragile”, states.

I am sure that there are many, many other interesting examples like this. Perhaps, as this talk takes place in the Week of Prayer for Christian Unity, I could show how “ecumenical” I can be by highlighting an example from a Jesuit university! The “Fordham Francis Index” is a great example of this kind of thinking, taking the key elements of the speech given by Pope Francis to the UN General Assembly and turning them into a composite measure of human development.

2. Discussions about financial support to the Church in European countries: there are often debates about this; currently, for example, I understand that there is a discussion going on in Poland about the Church fund and especially about whether it should continue to support the work of Polish missionaries



around the world.

If we had data on what those funds invested in missionaries actually achieve, especially if we could produce it in a form that could be compared to similar investments in equivalent types of actor, we could change the discussion about the church. We could focus the discussion on what we are contributing, or, as in this case, on what potential contribution would be lost if funding was removed.

On this point, let me say that the PASS has an upcoming meeting on measurement with the Oxford Poverty and Human Development Initiative lead by the PASS Academician Sabina Alkire, on “Measuring Integral Human Development from the Ground Up”, which will be involving Catholic aid agencies and missionaries on the ground in a discussion with some of the leading thinkers in the field to come up with better measures that can really support what Catholic actors and others are doing to promote integral human development.

Other upcoming PASS meetings are also planned on the following topics:

creating a culture of inclusion for persons with disabilities, climate resilience summit, debt in the global South, international taxation, preparation of the UN Summit on the Future, fraternal and sustainable economy ...

In conclusion, I would like to return to what I said at the beginning: it is providential that we have this 100th anniversary conference now. For I think in the next 100 years, IFCU and the Catholic university sector could play, and probably will play, a really crucial role in helping the wider society to face its crises. I think we could see the last 100 years as laying the groundwork, or having run a “pilot project”, for what is to come – for, as the Toniolo lecture and the work of the personalists shows, the key inputs we will need in the future can already be found, at least “*in nuce*”, in to come – for, as the Toniolo lecture and the work of the personalists shows, the key inputs we will need in the future can already be found, at least “*in nuce*”, in our past, and we need to do what the to come – for, as the Toniolo lecture and the work of the personalists shows, the key inputs we will need in the future can

already be found, at least “*in nuce*”, in our past, and we need to do what the Matthean text indicates to us, “bring out of our storeroom treasures new and old”. Doing this, we could make some really decisive contributions, both to resolving the social and systemic crises the world faces and to the evangelising mission of the Church in the world, telling her story in a new way. We could even imagine that by 2050, say, the average person on the street thinks of the Church not as a block on social progress but as a leader of social innovation. I think, too, that work together between the Pontifical Academies and IFCU could make a key contribution to all of this, and I look forward to trying to build that relationship between us.

Thank you very much.

NOTE

Text for the IFCU 100th Conference, Chester (UK), 25-27 September, 2003.
F. W. Beare, 1981, *The Gospel according to Matthew*, Oxford, Basil Blackwell, p. 254.

RECENSIONI

REVIEWS

Alfani Guido, *As Gods Among Men. A History of the Rich in the West*. Princeton & Oxford: Princeton University Press 2023

Guido Alfani, a professor of economic history at Bocconi University, offers a thematic overview of the rich, ranging from antiquity to the most recent times. The book shows that there have always been super-rich people and that their place in society has always been a subject of debate. Alfani's project is not so much to study wealth *per se* as to study the rich through the factors that explain their enrichment, the nature of this wealth and the impact of their presence in society. The book is "a general history of the wealthy across the ages" (p. 1) and "focuses on the rich as a social-economic group distinguished by affluence" (p. 3). It is neither about the rich as individuals, families or dynasties, nor as a social class: "the rich are solely defined solely based on their affluence" (p. 4). After a detailed introduction laying down the methodological foundations, the author presents a first section on the evolution of the definition of wealth and the concentration of this wealth, followed by a second on the pathways to wealth, focusing on the notion of aristocracy, the role of innovation, finance and the trade-off between consumption and savings, and then on the sociological evolution of the rich over the ages. A third part is devoted to the place of the rich in society, the difficulties posed by the concentration of wealth, the role of philanthropy, the interaction between the rich and politics, and the role of the rich during crises, including the most recent (war, health crisis, etc.).

The book combines the history of economic facts and the history of economic thought, fully fulfilling its role as a problematised historical overview from different angles. The whole is well documented and the author gives due consideration to the different thinkers of a given period, thereby avoiding too great a reduction to the main characteristics of each of the stages presented, which is the risk of major overviews and pathways. Thus, for example, in chapter 8 on the

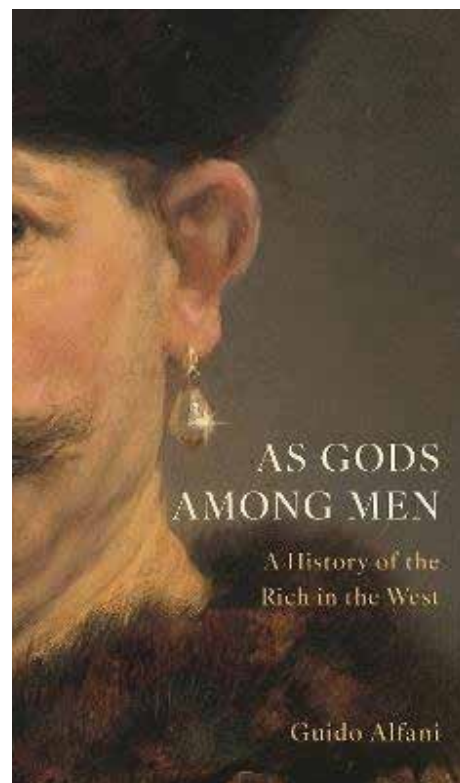
concentration of wealth, the author illustrates the suspicious nature of the medieval position by referring to several authors: not only Thomas Aquinas, but also Nicole Oresme, Bernardino of Siena and several lesser-known authors.

The author endeavours to show the major movements in the history of ideas by highlighting the coherence and gradual evolution of the perception of the rich in society. The nature of the work does not allow him to enter into the complexity of the debates specific to each period, nor into the internal evolution of the thought of each thinker. Thus "Aquinas and Nicole Oresme can be taken as representative of a widespread mistrust of the super-rich" (p. 217). The author attempts to support his position quickly on the texts of these authors, but it would be necessary to study all of Aquinas's economic texts in order to clarify his conception of wealth, and the hundred years that separate Aquinas and Oresme are marked by several developments that need to be taken into account for a detailed understanding, which would be more the result of analytical work than of a synthesis such as the one proposed here.

The book attaches great importance to the detailed presentation of the social status of the rich, the statistical definition of this social group and the nature of wealth, whether material or financial. Although it is not clearly explained, the author adopts a patrimonial definition of wealth, distinguishing between wealth and income. Wealth is perceived here as a stock, even if it is a question of the means of enrichment, i.e. of increasing this stock. This way of perceiving the term "wealth" could therefore lead to confusion, as the way in which wealth has been approached since François Quesney, in the mid-18th century, through the notion of the annual net product of the land, and then by Adam Smith, who began his *Wealth of Nations* in 1776 with the notion of "the annual labour of every nation", has introduced a

A History of the Rich in the West

Pierre Januard



perception of wealth in terms of flows. At the macroeconomic level, the traditional indicators of wealth are Gross Domestic Product or Gross National Income, rather than the assets of a state or of the population as a whole. The author sometimes combines the two approaches and uses data in terms of income or production, using GDP per capita, for example, to draw conclusions in terms of wealth in his own patrimonial sense, but he makes it clear the distinction between what comes out of the flow (production and income) and what comes out of the patrimonial stock, which he calls wealth (i.e. p. 42-43).

This well-documented and well-written book is easy to read and shares the author's vast erudition with the reader. It will be of interest to historians of social history and economic facts, as well as to historians of economic thought and philosophers. Economists accustomed to working on the concept of wealth will also find in it a stimulating displacement of their usual thinking, since this wealth is held by real people.

RECENSIONI

REVIEWS

Anthony GOERZEN (ed.)

Research Handbook on International Corporate Social Responsibility Edward Elgar Publishing Cheltenham, UK - Northampton, MA, USA, 2023

Sotto il coordinamento di Anthony Goerzen, sessantadue autori, in ventinove capitoli organizzati in cinque parti, hanno collaborato a un'opera - *Research Handbook on International Corporate Social Responsibility* - (Csr) che, per la serietà e la completezza dell'indagine e della riflessione condotte, resterà nella storia del pensiero sociale, in specifico di quello che studia la responsabilità sociale delle imprese.

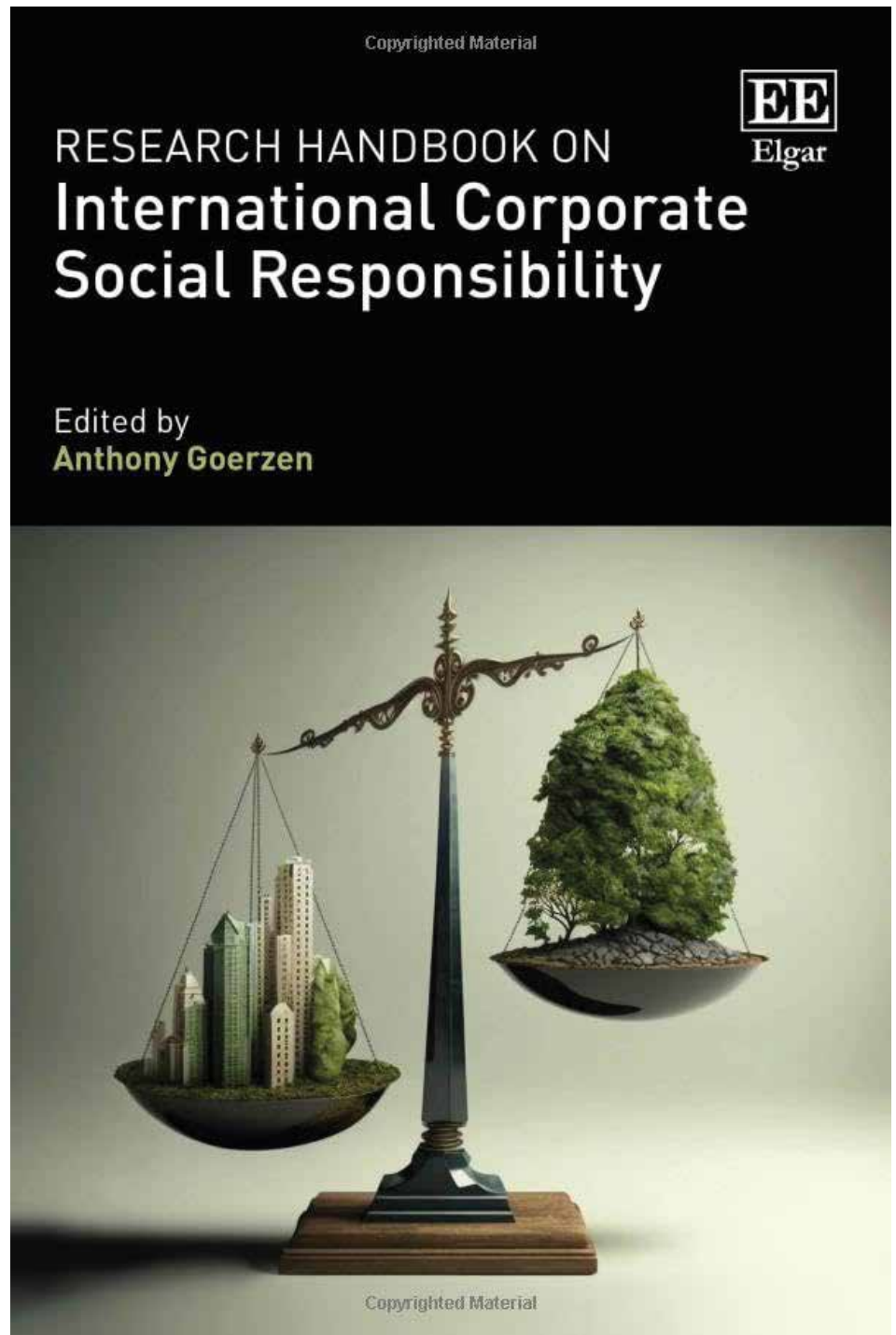
Il curatore insegna Imprenditoria Internazionale all'università Queen's di Kingston, nell'Ontario, e presiede la sezione canadese di Aib, l'accademia internazionale che studia i comportamenti internazionali delle imprese, in particolare delle multinazionali. Il *Research Handbook* risente già nel titolo della specializzazione del curatore, ma non ne viene limitato, visto che è strutturato sull'interdisciplinarietà. Tra gli autori figurano economisti (Liena Kano, dell'Università di Calgary), consiglieri politici versati sui diritti umani e le risorse naturali (Joanne Lebert, visiting fellow in Studi sui rifugiati ad Oxford), esperti di politiche per l'occupazione, la salute e la gioventù (Linda Jane Liutkus, operatrice Unicef e World Child Canada), operatori della catena agroalimentare (Cynthia Waltho dell'Università di Waterloo), giuristi (Lise J. Johnson, consigliere in un primario studio legale), e antropologi, ambientalisti, giuslavoristi, esperti in paesi in sviluppo.

Le cinque parti del testo - "*Historical and Current Assessments*", "*Challenges and Shortcomings*", "*Partnerships and Collective Action*", "*Csr in Emerging Markets*", "*A View Forward*" - raccolgono e organizzano le differenze di approcci e di esperienze, attraverso un trattamento sistemico che riesce a garantire all'esposizione la necessaria coerenza, sia all'interno di ciascuna parte, che nel complesso dell'opera.

Si viene a disporre di un concetto di

Un manuale di grande utilità per imprese, sindacati, stakeholder

Luigi Troiani



Csr ricco di approcci i più diversi, ciascuno dei quali contribuisce alla ricomposizione collettiva grazie ai risultati della formazione e specializzazione che l'hanno generato, fornendo al libro abbondanza di posizioni, soluzioni, casi di studio, che tutti si ritrovano nella definizione di Csr richiamata da

uno dei saggi, a firma Tatiana Kostova e Valentina Marano: "*Csr refers to a collection of organizational practices that firms adopt to create social value by reducing the firm's negative externalities or creating positive ones*".

Giustamente il curatore scrive che gli autori hanno raggiunto il *collective goal*

di fornire alla comunità degli studiosi di scienze sociali un'originale e "fresca" apertura sul concetto di Csr internazionale, soddisfacendo lo sforzo di partenza teso ad: informare i manager che hanno la responsabilità dei comportamenti e delle performance delle loro organizzazioni, sollecitare i policy-maker a sviluppare percorsi ragionevoli equi ed efficaci per la necessaria regolazione dell'attività economica, aiutare le Ong a diventare migliori "*advocates and monitors*".

La scelta esplicita dei quattro gruppi pubblici ai quali indirizzare l'*Handbook* non è casuale. Per il modello proposto dalla comunità transnazionale di studiosi che hanno realizzato il corposo volume di 500 pagine, da un lato occorre far crescere le consapevolezze concettuali di studiosi e politici, dall'altra attrezzare imprenditori e manager a indirizzare in termini di responsabilità sociale le attività delle loro imprese, in particolare nel caso operino per imprese multinazionali o con paesi in sviluppo. Le Ong vengono situate a bordo campo, con funzioni di sorveglianza e difesa.

Il volume ipotizza una rete di Csr internazionale, tale da generare incentivi alle buone pratiche di responsabilità sociale, e protezione per chi le promuove e realizza, con l'obiettivo di arrivare a dotare di sostenibilità la catena globale del valore. In diversi dei suoi saggi avverte che i lavoratori risultano tanto più vulnerabili quanto più "lontani" dai centri dove si prendono le decisioni che li riguardano. È ciò che capita con le multinazionali. Goerzen scrive di una vera e propria "*race to the bottom*" che riguarda i modi con i quali si costruisce l'approvvigionamento sulle linee della produzione globale del valore, a partire dalle materie prime e dai semilavorati dei PVS. Non casualmente un intero capitolo del libro analizza le diverse strategie da attuare, a seconda delle diverse "distanze" nelle quali la Csr va a porsi (locale, transnazionale, globale).

Nell'analisi degli autori, la perversione subita dalla catena globale del valore a partire dalla crisi del *subprime* del 2007, ha prodotto due enormi falle nel sistema internazionale, né solo quella economica né solo quella sociale: l'abbassamento dello standard di vita assoluto di miliardi di persone (marginali cronici, disoccupati, precari, sottopagati, pensionati, malati), l'aggressione all'ambiente fisico e biologico.

La prima falla ha generato i pochi troppo ricchi e i troppi troppo poveri. La seconda i micidiali dati sul riscaldamento globale e i livelli di inquinamento ambientale. Nel decennio trascorso i primi cinque miliardari hanno raddoppiato la propria ricchezza, mentre la povertà globale si è incrementata del 60%; l'obiettivo dello sradicamento delle povertà è stato così spostato a 230 anni da ora. In quanto al riscaldamento globale, si è da poco chiuso il febbraio più caldo dal 1850, con una temperatura media mondiale superiore di 1,4°C alla temperatura media di ogni febbraio del XX secolo. Commenta uno degli autori del libro: "Per quanto ripugnanti tali comportamenti possano risultare a chi li osserva, molte imprese ottengono un vantaggio economico diretto dal violare diritti umani." E dire che la Dichiarazione Universale sui Diritti Umani risale al 1948, a più di tre quarti di secolo fa.

È la scarsa pratica di Csr che, con altri fattori, risulta all'origine delle due falle e dei fenomeni che le producono. Come ha scritto recentemente Oxfam, se Jeff Bezos (167,4 miliardi di dollari, un quinto dei quali accumulati dal 2020) si conformasse alle regole di Csr invece di ostracizzare i sindacati e fissare pesanti condizioni di lavoro, gli operatori di Amazon avrebbero ben altri turni, retribuzioni, welfare, con vantaggi evidenti per il tono dell'economia e il benessere socio-ambientale.

Il ragionamento vale anche per il riscaldamento globale. Ad eccezione di rari esempi virtuosi, i grandi attori economici transnazionali fanno ancora troppo poco per neutralizzare le emissioni di CO₂, violando uno dei primi codici comportamentali della Csr: il rapporto "amichevole" con la natura e gli stakeholder.

Dalla lettura dell'*Handbook* si ha conferma che se i grandi soggetti imprenditoriali multinazionali non assumono la Csr come principio ispiratore della loro azione mirata alla produzione di beni e profitto, le pratiche corporate che ormai si caratterizzano - soprattutto nei paesi in sviluppo e in quelli con regimi dispotici - per sfruttamento del lavoro ed evasione fiscale, finiranno (più presto di quanto si immagina) per generare un sistema sociale dove le ediseguaglianze estreme saranno considerate il nuovo "normale" dell'assetto politico e socio-produttivo. Magari ancora mascherato con meccanismi

di democrazia formale come il voto.

Su questo punto l'*Handbook* va giù pesante: per non aver voluto aderire ai principi di Csr, si è messo termine alla speranza che più crescita e più sviluppo economico, comportasse automaticamente più benessere per le popolazioni e la gente comune. Alla speranza è stata sostituita la vana illusione di un futuro di consumi e progresso, ma ora neppure più quella risulta credibile.

Quando si guarda alle soluzioni da adottare per consentire a temi come l'ambiente e il clima, la giustizia salariale, l'equità della fiscalità, la *fairness* dei costi delle materie prime e la conseguente ristrutturazione della *supply chain*, il primo appello che si ritrova in diversi saggi, riguarda cosa può mettere in campo l'Europa, dove la sensibilità alla Csr appare relativamente alta. Vanno a confronto il sistema di economia "sociale" anglo-sassone e quello euro/renano, attribuendo al primo la prerogativa di rendersi flessibile attraverso il "rule-based system", mentre al secondo si rimprovera di irrigidirsi nel "principles-based system".

Non è un'affermazione necessariamente condivisibile, e lo conferma il dibattito che sulla bipartizione si apre tra i diversi autori in diversi punti del volume.

Però gli autori concordano nel chiedere più impegno alla cultura accademica e di ricerca, alle Ong specializzate, ai sindacati, alle organizzazioni internazionali come Ocse, alle religioni che predicano una dottrina sociale che rispetta la persona, così che operino fattivamente per un paradigma collaborativo che ponga in dialogo management, studiosi e operatori del sociale, sindacati, per un modello di "*supply chain*" sostenibile.

Al tempo stesso denunciano con preoccupazione la situazione nei paesi in sviluppo dove il dialogo sociale - contrariamente a quanto accade nelle società cosiddette occidentali dove dialogo sociale e responsabilità sociale d'impresa sono istituzionalizzati e talvolta costituzionalizzati - è spesso ostacolato o addirittura represso. In situazioni del genere, l'ambito risultato che dovrebbe scaturire dal diffondere nelle imprese la pratica dei principi di Csr, ovvero quella che il libro chiama la *social and environmental performance*, è praticamente impossibile da raggiungere.

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OIKONOMIA

ANNO XXIII - N.2 - GIUGNO 2024



Oikonomia è la rivista della Facoltà di Scienze Sociali (FASS) della Pontificia Università S. Tommaso di Roma (PUST). Vi collaborano i docenti, i graduati e gli studiosi che entrano in relazione di collaborazione con la FASS.

Le materie trattate sono all'interno delle scienze sociali come la nostra tradizione accademica le intende. Infatti le discipline rappresentate nella FASS sono divise in cinque aree: filosofica, giuridica, storica, psicosociale, economica.

I temi trattati negli anni durante i quali si è concretizzato il nostro profilo editoriale spaziano da quelli teoretici, alle relazioni di congressi, a recensioni di libri significativi. Particolare attenzione abbiamo posto nello scegliere ogni volta un testo del passato recente o lontano, ma che comunque fosse significativo in relazione al tema principale del fascicolo. La Pagina Classica è sempre in relazione con il contenuto dell'Editoriale. La redazione esercita una selezione basata sulla correttezza metodologica dei contributi non sul loro contenuto. Di esso i singoli autori sono gli unici responsabili scientifici.

Oikonomia is the journal of the Faculty of Social Sciences (FASS) of the Pontifical University of St Thomas in Rome (PUST). It is a collaborative project of the lecturers and students of the faculty, and of scholars who work with the FASS.

The issues that are covered are those of the social sciences, as we understand them in our tradition, covering five areas: philosophy, law, history, psychology/sociology, economics.

The subjects treated as the journal's editorial profile has developed have ranged from theoretical issues to reports on conferences, to reviews of important new books. Particular attention is given in every number to selecting a text from the recent or distant past, but which always has particular significance for the main theme of the number; this text, the "classic page", is always directly connected with the editorial.

The editorial committee ensures only that a correct methodology has been employed by the author of contributions. It does not vet the content of the articles, for which the sole responsibility lies with the authors.

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