

Religious Roots of European Welfare Models

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Abstract

Gösta Esping-Andersen's division of European welfare regimes to social-democratic Nordic, liberal Anglo-Saxon and conservative Central European could be named as Lutheran, Anglican-Calvinistic and Catholic, as well.

This paper examines, first, how the European welfare institutions emerged in Byzantium from where they diffused to the West. Second, the paper gives general view how the tension between the Oriental co-operative thinking and Hellene competitive thinking can be seen through the history of European poverty. Third, the paper gives an overview how the Catholic, Lutheran and Anglican-Calvinistic social ethics were formulated and how they influenced their respective societies. finally, the paper discusses how the European integration and globalisation might lead to reformulation of the social ethics of these churches.

Keywords: welfare, poverty, social ethics, churches

Introduction

What has been will be again,
what has been done will be done again;
there is nothing new under the sun.¹

Many contemporary social science theories disagree with this ancient Biblical text. Leading sociological paradigms emphasise change instead of continuity. Modernity is seen as qualitatively different from all previous periods. Even theories, which see modern society as a result of long evolutionary process, see modernity as different from past societies. It is not surprising that postmodernism is framed likewise different from modernism.

This is, however, only a partial truth. Sure, modern world have qualities that have existed never before, but hopes and fears, joys and sorrows today are almost similar than those described in Sumerian cuneiform texts 5000 years ago. Thus, along the evolution of human societies, some

¹ Eccl. 1:9 (NIV)

elements of them are almost constants. However, even if we accept some sort of evolutionary thinking, we have to remember that the progress is not linear. If we look the changes in our societies with longer time perspective, we note that there are different kinds of waves. A French historian Ferdinand Braudel divided different periods in three different kinds of periods that together form the total history (*histoire totale* or *histoire globale*)². First, there are short waves, like weeks, change between winter and summer, market cycles, etc. Second, there are medium long cycles, *conjunctures* of 10-50 years. It can be said that this is a period where the zeitgeist remains almost the same. Typical examples would be the Cold War period or post-communistic era in the Eastern Europe. Then, there are *longue durée* epochs that last a century or more. Middle Ages, Enlightenment and Modern belong to this category as well as climate changes. However, along with these Braudel's three types, we can recognise so long cycles, that they can be treated almost as constants. These are cultures or civilisations, like 3000 years of ancient Egypt, Greco-Roman culture or the Christian Europe.

In this paper, I am looking this continuity from the welfare perspective. I study how various European subcultures have utilised the values of their dominant religions when they have created their different welfare regimes. Gösta Esping-Andersen's Nordic, Continental and Anglo-Saxon welfare regimes³, could also be called Lutheran, Catholic and Anglican-Calvinistic models. This utilisation has happened, basically, in two ways. First, as path dependency theory⁴ and various routinisation theories⁵ state, each stage in each process is based on the previous stage. Thus, there can be seen continuity between various epochs in European history: Byzantine institutions were adopted by Western Europe, secular philosophy utilised the concepts that theologians had developed through centuries, etc. These paths, are not, however, straight and one way only. As Jaakko Hämeen-Anttila, in his *Mare Nostrum* states :

To a historian, the Mediterranean cultures reveal themselves as a continuum. Same phenomena, ideas and forms repeat themselves in the various cultures of the area, and it is easy to recognise continuities between them. A cultural form, developed in one place, moves to another location, is developed there and is lend back to the original donor in a developed form.⁶

This notion is also valid in the case of whole Europe. This lending and borrowing of ideas means that –more or less- all European sub-cultures are mixtures of several elements. When we speak of

² Braudel (1958; 1978).

³ Esping-Andersen 1990.

⁴ On path dependency theory, see David (1985; 2000) and Arthur (1989; 1990).

⁵ Hannan and Freeman (1977; 1989) on hierarchical inertia, Berger and Luckmann (1972) on routinisation of thought and Meyer and Rowan (1977, 341-346) on institutionalised rules.

⁶ Hämeen-Anttila 2006, 7 (my translation from the original Finnish text).

some special characteristics of a culture, we can do it only in the sense of Weberian ideal-types. Reality is always more complicated than any scientific model.

However, it is not only question of previous epoch giving a model for the next. There are certain node points in history when people take a new direction. In Berger and Luckmann's terms, the routinised ideas in the symbolic universe are taken into a re-examination and after processing them, the new form has been restored in that symbolic universe⁷. Herbert Blumer has described this kind of process thesis of general social movement. According to him, people who face a new situation start milling it. In this milling process, they create an explanation of their situation and a plan what should be done. In macro level, this processing happens through literature.⁸ Rather often, the Bible and Greco-Roman classics have acted as this sort of literature – or at least inspiration to this literature. People have read them and they have inspired their actions. Thus, it can be said that along moving through some path, cultural influences have “jumped” directly from ancient times to various epochs of the European history. Thus, Thomas Aquinas found Aristotle and combined his philosophy into the Christian doctrine; Martin Luther's studies of the Letter to Romans led to the Reformation; Evangelical emphasis on the Bible led to the emergence of the Social Gospel, etc. The “paths” can be seen below in the figure 1.

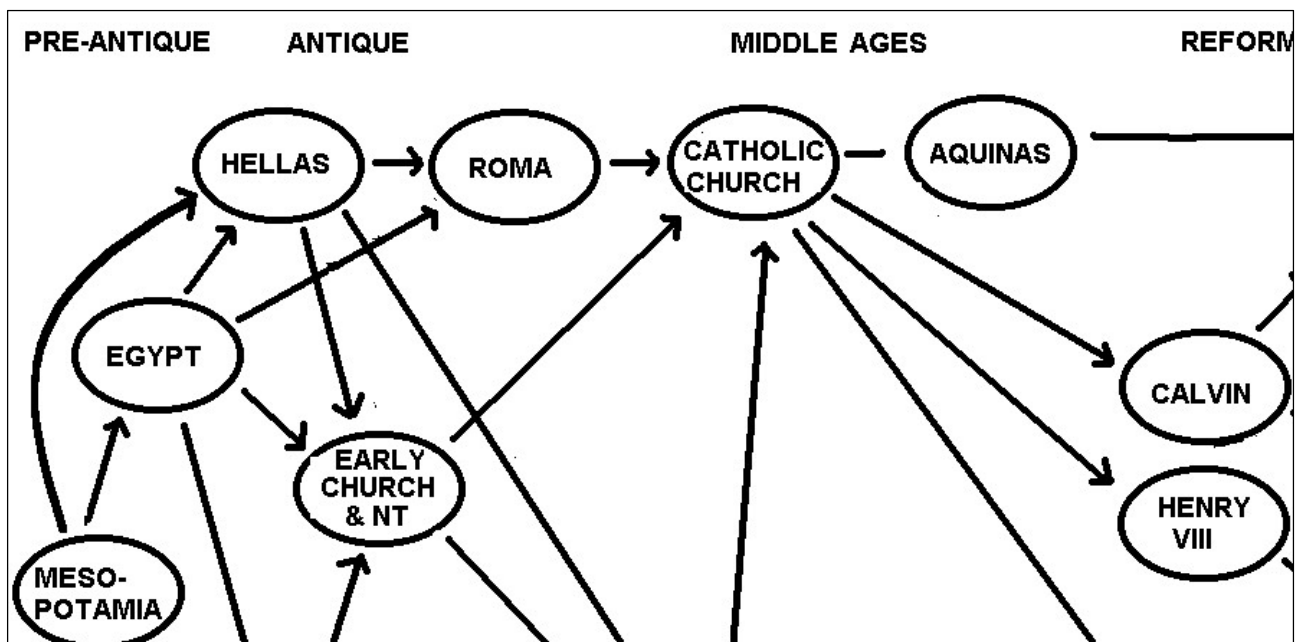


Figure 1: Welfare paths in the West

⁷ Berger and Luckmann 1972.

⁸ Blumer 1953[1939]; 1957.

Europe's Oriental Origins

Our modern culture is a child of ancient Mesopotamia and Egypt. We still use the modification of 5000-year old Egyptian Sothic calendar. We still divide the circle in 360 degrees, hours in 60 minutes and them in 60 seconds – utilising the old Sumerian 60-system. We use the Jewish seven day week-system. The concept of subsidiarity can be found in the Law of Hammurabi. The list is endless. This ancient Oriental heritage has come to us via two links: Greece and Israel.

There are two major stories that link European roots to Orient. The Biblical story of Abram migrating from Ur to Land of Canaan is the one. All three Oriental world religions, Christianity, Judaism and Islam see Abraham as their ancestor. Another story is Herodotus' story of the capture of princess Europa from Phoenicia and bringing her to Grete⁹. Especially Ionian culture was more 'Eastern post in the West than vice versa.' These myths tell us that there were active contacts between cultures of the Eastern Mediterranean.

In spite of common oriental roots, there are also significant differences between Greek and Oriental cultures and these differences are the basis for the tensions in the European poor relief thinking through millennia. Max Weber noticed that the basic difference between the great river cultures and Greek culture lied in the form of agriculture. In Mesopotamia

the basis of the economy was irrigation, for this was the crucial factor in all exploitation of land resources. Every new settlement demanded construction of a canal, so that the land was essentially a man-made product. Now canal construction is necessarily a large-scale operation, demanding some sort of collective social organization; it is very different from the relatively individualistic activity of clearing virgin forest. Here then is the fundamental economic cause for the overwhelmingly dominant position of the monarchy in Mesopotamia (and also in Egypt).¹⁰

Thus, according to Weber, irrigation required high level of organisation and co-operation. In Karl Polanyi's terms, it was a redistributive economy¹¹, where temples, palace and clans organised the works, collected the fruits and distributed adequate proportions to individuals. In the north, the more agriculture was based on rainfall and not on irrigation and, thus, did not require similar co-operative action than irrigation¹². As a consequence, these rainfall-societies consisted of independent households, *oikoi*, which competed with each other. In Orient, co-operation was interpreted as 'organic' – everyone has a certain place in the hierarchical society that was 'an image of heaven' – the Greek co-operation was based on agreements. Ferdinand Tönnies described this

⁹ Hdt 1.2.

¹⁰ Weber 1976, 84.

¹¹ Polanyi 1944, 49.

difference with concepts of *Gemeinschaft* and *Gesellschaft*. The first is based on “natural will “(or real or imaginative kinship relations) while the latter is based on “rational will” - agreements between autonomous actors.¹³

The competitive Greeks had another mechanism that fostered some sort of unity among them, namely reciprocity. It was manifested in the institution of *philia*. *Philia* means literally ‘my own’ – my family, my belongings, my friends, my dependants, etc. Each *oikos* created *philia*-relationships with other *oikoi* and changed goods and services. As Marcell Mauss¹⁴ and other gift-theorists¹⁵ have argued, in this sort of society, the main economic goal is not to collect fortunes but to give it away. The main currency is, then, not money but credits. The most powerful man is not the one who owns most of his resources but the one who can mobilise the largest resources through his creditors. In the case of the poor, the counter-gift meant obedient klientelism¹⁶.

This difference between Oriental and Greek thinking can be seen in all levels of the society, but especially in the attitudes towards the poor segments of the society. While the poor in Oriental thinking were under gods’ special protection, in Greece the poor were losers, rubbish¹⁷. While in Orient, gods required the rich to help the poor, in Greece people helped only their *philoï*. The extended *philoï*-model was utilised in Greek and Roman poor-care by granting the state allowances and subsidies on the basis of citizenship. Classical Athens knew unemployment-subsidies to sailors and in Rome there was the famous *panem et circences*-policy which granted the state support to the 1/5 of the city’s population – the citizens, the *philoï*¹⁸. Greek and Roman poor-relief never focused on the most miserable population - on the contrary. While slaves in Orient never lost their human value, in Greece they were “human legged animals”, “living tools” or “extensions of their masters”¹⁹. Slaves were dehumanised in Greek culture in order to legitimate their inhuman treatment²⁰.

Throughout the European history there has been a tension between aid to the *philoï* (practically to the impoverished members of one’s peer-group) and aid to the very poor. Moreover, among poor,

¹² Lamberg-Karlovsky 2000, 14f.; Weber 1976, 84.

¹³ Tönnies 1974.

¹⁴ Mauss 1967.

¹⁵ For example, Sahlins (1969; 1972), Morris (1986) and writers in *Reciprocity in Ancient Greece* (1998).

¹⁶ Hands 1968, 35.

¹⁷ Finley 1985, 38ff. ; Hands 1968, 62-115.

¹⁸ Hands 1968, 106.

¹⁹ Plat.Law 9.916a; 12.966b; Aristot.Nic.Eth. 8.1161b Aristot.Pol. 1.1253b.

²⁰ Aristoteles justified this with his thesis of natural slavery (Aristot.Pol 7.1327b.; on this, see Harvey 2001).

there has been a distinction between ‘the deserving poor’ (ascetic monks, people impoverished because of a catastrophe, etc.) and the mob (those from the lowest classes).

The major periods when new innovations in the welfare were developed were Byzantium (from where the most welfare institutions can be traced), 11th and 12th centuries (when the majority of European monasteries were founded), Reformation of the 16th century and modernity from the 19th century on. It is in this rough time-setting where the welfare reformists emerged.

Harmony and Tension Between Oriental and Greek Thinking

Early Christian Charity

The Christian Church adopted both Oriental and Greek traditions and combined them to systematic philanthropy. A special character in Christian philanthropy was that it was question of identification to Christ: *imitatio Christi*. It was the responsibility of a Christian is to follow the example of his Lord who defined his mission as follows:

the Spirit of the Lord is on me, because he has anointed me to preach good news to the poor. He has sent me to proclaim freedom for the prisoners and recovery of sight for the blind, to release the oppressed.²¹

Thus, evangelist Luke presents here the social program of Christ and Christian church: aiding the poor, freeing the imprisoned, healing the sick and empowering the oppressed. Basically, Christ’s declaration was the same that was announced in several enthronement declarations of Oriental kings.

While the Christian Church adopted the models of justice and charity from Orient, its dogmatic was based on Greek philosophy. Plato was ‘a Christian before Christianity’ and his philosophy lies behind many Christian doctrines. This was a result of Christianity’s moving to the west and adaptation in Greco-Roman culture. In this process, many Egyptian and Mesopotamian philosophical interpretations of Christ were doomed as heresies while the Greek philosophy became the dominant way of interpretation²². This dichotomy between Oriental and Greek thinking can be seen through the European history of poverty, philanthropy and welfare.

²¹ Luk 4:18 (NIV)

²² A good example of Greek influence in Christian thinking is Dante Alighieri’s *La divina commedia* in which Dante’s guide was not any of the prophets or apostles but a Roman Orphic poet Virgil. In general, the Catholic view of the afterlife is more based on Plato’s *Republic* (Plat.Rep. 614-621) than the Bible.

Emergence of Welfare Institutions in Byzantium

Demetrios Constantelos notes that it was only in the third century that the Greek concept of *philanthropia* replaced the New Testament concept of *agape*. The reason for the change lies in the idea of *imitatio Christi*. The word philanthropy (God's love to man) suited better to this purpose than *agape*, brotherly love. Constantelos states that "[t]he ideal Christ is the Pantocrator Philanthropos [men loving ruler of the world] or the Eleemon [reliever], depicted as the prototype whose philanthropy men are expected to imitate²³." In Byzantine thought concepts of *eros*, *agape* and *philanthropia* overlapped and became to mean both God's love and Christian charity.²⁴

The Oriental model of the ruler as a channel of divine love was adopted in Byzantium. When the emperor was a philanthropist by duty, court members imitated this practice of charity as well. Along with almsgiving and supporting philanthropic institutions, according to Constantelos, "it was customary for Byzantines of all classes to designate the poor, orphans, or charitable institutions as beneficiaries in their wills²⁵."

One of the first European 'welfare reforms' occurred in Byzantium where the state *panem et circences*-subsidies based on citizenship were gradually replaced by the Oriental model of giving the aid to the very poor – irrespective of citizenship²⁶. This aid was channelled through the Church and its various institutions.²⁷

Monasticism emerged first in Byzantium from where it diffused to the west. Although mysticism was the major tone in Eastern Christianity, philanthropy became a major practice along with prayer in monasteries. Constantelos tells that this practical aspect led to tradition where monasteries were founded, not only in remote regions, but in cities as well. Basilio's philanthropic institutions

included a hospital, an orphanage, an old-age-home, a hospice for poor travelers and visitors, a hospital for infectious diseases, and an institution for indigents. Collectively, Basil's institutions became known as the *Basileias*, which was located on the outskirts of Caesarea. The staff was composed of both laymen and clergymen.²⁸

²³ Constantelos 1991, 31.

²⁴ Constantelos 1991, 25-32.

²⁵ Constantelos 1991, 107.

²⁶ According to Kahzdan (1994, 70f.) Byzantine philanthropy had three major actors: state, which gave aid on the basis of citizenship; the Church and its organisations, which gave aid to the most poor; and private wealthy citizens. Basil the Great's *Basileias* were founded during the last quarter of the fourth century (Constantelos 1981, 86) and the free distribution of bread by the state was cancelled in 618 after the Persian conquest of Egypt.

²⁷ Kahzdan 1994, 74-82.

²⁸ Constantelos 1991, 52.

Basilio's institutions became the archetypes of philanthropic institutions that have been a model for the rest of Europe during almost 2000 years. These institutions diffused soon to West and became integral part of the charity of the Catholic Church.

After all this a reader surely wonders that if the system was so large and ethos so profound, why there still were poor. Bronislaw Geremek argues that in the writings of Church Fathers, the poverty was a religious virtue. The New Testament concept of poverty became assimilated to humility. However, in order to be a virtue, poverty had to be voluntary. Being born as poor was no virtue.

Another factor that did not encourage to eliminate poverty was the fixed hierarchy of the society. The system was not that of sharing and equality. When the philanthropy was a religious act, the poverty was something that the rich needed in order to practice philanthropy. Thus, the emphasis was on the benefactor's need of salvation and not on the poor's need of relief. Because of this attitude, Byzantines did little to prevent or total eliminate the poverty. Despite this, the state and especially the town of Constantinople were known of their hospitality to both citizens and foreigners. The legacy of the Byzantium is mainly in the supply of ways of thinking and organisational models for the rest of Europe.

Mediaeval Philanthropy in the Western Church

In Western Europe, the relationship between rich and poor was that of mutual dependency. This view was formulated in the *Life of St. Eligius*²⁹ as follows: "God could have made all men rich, but He wanted there to be poor people in this world, that the rich might be able to redeem their sins³⁰." In this statement, we see the phenomenon that became a prevalent feature in Medieval thinking: the poor existed so that the rich could help him and gain merits. Later Thomas Aquinas, based on Aristotles³¹, developed this view in his doctrine of good life. According to Aquinas, good life was the great aim of the life. However, one cannot live good life without charity and this makes the alms-giving so central in both Catholic and Orthodox thinking. In his *Summa theologiae* Thomas defines his *ordo caritatis* as follows:

Now the object of charity's love is God, and man is the lover. Therefore the specific diversity of the love which is in accordance with charity, as regards the love of our neighbor, depends on his relation to God, so that, out of charity, we should wish a greater good to one who is nearer to God...

²⁹ Bishop of Noyon-Tournai. Born c. AD 590, died 660. (Essen 2003)

³⁰ Patrologia Latina vol CXVIII, col 1625, quoted in Geremek 1994, 20.

³¹ Aristot. Nic. Eth. 1098b1.4; 1099a1.12-14.)"

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Thus, the objective of charity was not to relieve the poor as such but to please and serve God. The poor existed so that the rich could have possibilities to show charity. Elimination of poverty was not even option in mediaeval thinking.

In the practical level, the change in social conditions and attitudes from 11th century on modified the charity in many ways. In the 13th century there emerged a practice to record those who were given help from charitable institutions. This, so called token system³³, was, on one hand, a signal of the need to control both poor and of the given aid³⁴. Geremek notes that this was, “thus, in conflict with the traditional conception of the good deed, where the most important element was the psychological intention of the alms-giver³⁵.” On the other hand, the compassion for the poor played a minor role in the philanthropy of monasteries: giving aid was simply one of their liturgical duties. This frame led monasteries to the situation where the proportion of the internal costs grew and given aid diminished³⁶. This, in turn, lead to the increase of secular assistance through fraternities³⁷ – especially to the impoverished members of one’s social class. These ‘shamefaced poor’ constituted a majority of beneficiaries – but minority of the poor – just like in Greek and Rome. In general, the role of the Church as a channel of charity diminished during this period.³⁸ In the same time, the Greek *philoi*-type aid (through the fraternities to their peer) increased and general aid to the most poor diminished.

In the 14th century emerged the idea of municipally organised hospitals to which all assistance was centred. In 15th century, it was a practice in most European towns. In spite of these attempts, these organisations did not abolish begging. Most beggars in 15th century were professionals³⁹ and, for example, city of Augsburg singled them in 1475 as an own professional group who had to pay the same tax as day-workers. This professionalisation was seen, for example, in the way how beggars imitated the guild structure. There were contracts between two individuals for begging with

³² Aquinas 1920, 26:7

³³ Those who were recorded, got a metal token that ensured them for permanent assistance.

³⁴ Geremek 1994, 46.

³⁵ Geremek 1994, 38.

³⁶ Geremek gives an example that the Abbey of St. Denis, near Paris, directed only 3 percent of its budget to assistance at the turn of the 14th century when the old Charlemagne’s orders stated “that Church tithes were to be divided into three equal parts: for churches and shrines, for the maintenance of priests and for the poor.” (Geremek 1994, 17, 41)

³⁷ Fraternities functioned, thus, also as mutual insurance companies.

³⁸ Geremek 1994, 38-43.

³⁹ Geremek (1994, 50) tells that along just begging, the wandering beggars had a significant role as musicians and

a fixed salary, pools that shared their total income once a week and different brotherhoods, especially those of the blind.⁴⁰

With these modifications, the Mediaeval society moulded its attitudes and reactions to poverty. It was the time when Oriental and Hellene ideas were combined and harmonised. It was also the time that provided organisational models for the emerging Reformation.

Differentiation of Oriental and Hellene models

The Reformation changed the track of European welfare thinking perhaps more than any other period. As we know, the fundamental *heureka*-moment for Martin Luther was when he read from apostle Paulos' Epistle to Romans that "The righteous will live by faith⁴¹." There were several consequences of this finding. From the welfare point of view, the major issue was that – contrary to Catholic thinking – Protestants held that nobody could "earn" his/her place in heaven by donations and almsgiving. Another point was that there was no need for mediators between human and his God. Everyone had right to approach Him directly and everyone had right to read and interpret the Bible by him/herself. This, in turn, made an individual an independent member of the church and society – contrary to Catholic thinking where individual was foremost a member of his/her family. It can be said that these notions changed the Northern Europe and to be North America.

"There should be no begging among Christians" - Lutheran welfare thinking

Along his spiritual mission, Luther also focused on what he saw as deacon work. This also arose from the Bible – in this time from the Old Testament: "There should be no poor among you⁴²." In his *Long Sermon on Usury*, he stated that there should be no begging among Christians⁴³. This notion led Luther to reform the social care of the Protestant cities. He cancelled the numerous guild-funds and combined them to one local fund, which was administered by the city-council⁴⁴. Similar

actors.

⁴⁰ Geremek 1994, 44ff., 50f.

⁴¹ Rom 1:17 (NIV)

⁴² Deut 15:4 (NIV).

⁴³ Luther 1962.

⁴⁴ Lindberg 1993; 2001; Grimm 1970

attempts were formulated in Calvinism as well⁴⁵. The teachings of Luther laid, thus, the foundations of the legitimacy of the modern welfare state⁴⁶.

Especially Halle's Institutions became significant actors in developing new models for the state, Lutheran churches and welfare. Halle became the leader of academic thought for the whole 18th century. There, education and poor relief were inseparable.⁴⁷

Developments in Bismarckian Prussia, which has been generally seen as the early version of the welfare state, were an outcome of Pietism and its belief that poverty could be overcome⁴⁸. According to Aage B. Sørensen the influence of Pietism is threefold. First, it strengthened state intervention into fields that had previously been a territory of the Church. Second, it established a Protestant tradition for small clubs and independent organisations. Third, Halle's Institutions enabled central administration to be less dependent on land owning nobles by supplying educated civil servants to states. This educated staff was inspired by Pietistic ideas and launched the first attempts towards welfare states in Denmark and Prussia⁴⁹.

The Bible, Classics and Catholic Welfare Reforms

Bismarck's Pietism-oriented civil servants aimed to implement their ideas – and, in the same time, block the spread of Communism. However, reforms in the country faced large opposition. During the years 1871-1891 the *Kulturkampf* (cultural struggle) between chancellor Bismarck and the Catholic regions was a struggle for the division of labour and influence in the fields of education, culture, and welfare. In 1891 pope Leo XIII sent his encyclical *Rerum Novarum*, which advocated local solutions to social problems. The social ethics in this encyclical was based on Thomism and, thus, continued the mediaeval Catholic tradition.

Forty years later pope Pius XI sent his encyclical *Quadragesimo anno* (Forty Years) where he continued the ideas of Leo XIII and launched the principle of subsidiarity⁵⁰. These two encyclicals became the major expressions of the Catholic social ethics. Catholic Labour Movements in France,

⁴⁵ Kingdon 1971; Scholl 1980.

⁴⁶ On the influence of Lutheranism on the Nordic welfare state, see Lindberg (1993; 1994; 2001), Gelpi and Bowen (1994), Kopperi (1996), *Health Care and Poor Relief in Protestant Europe, 1500-1700* (1997), Sørensen (1998), *Health Care and Poor Relief in 18th and 19th Century Northern Europe* (2001).

⁴⁷ Ipfling & Chambliss 1994, 36.

⁴⁸ On the influence of Pietism on Prussian (and Danish) welfare states, see, for example, Sørensen (1998) and Ipfling & Chambliss (1994, 36)

⁴⁹ Sørensen 1998.

⁵⁰ On subsidiarity principle, see, for example, Kelly (1998) and d'Onorio (2002).

Germany and Italy adopted this social ethics as their principles. From them, the Catholic social ethics was adopted as social policy of Christian Democratic Parties in these countries.⁵¹

The Catholic social ethic has seen the concept of righteousness as a property of individuals but not as a property of communities⁵². In this thinking the focus is on the actor. With the moral codes the society tries to grant that there is enough individual philanthropy to meet the needs⁵³. This ethic proposed the principle of subsidiarity, which means, in a nutshell, that there is a hierarchy on who is responsible of individual welfare. It has three basic statements. First, an individual has to take care of himself. If (s)he is unable to do so, it is the responsibility of the family to do so. If the family cannot do it, the responsibility moves to kin, neighbourhoods, voluntary organisations, churches, etc. The state is then the last resort when there is no other possibility. Second, the higher level has a responsibility to make sure that the lower level can carry its responsibilities. Third, the higher level is not allowed to interfere the actions of the lower level if the lower level can handle its responsibilities.

This has been accompanied by the vague understanding of the state. State has been something imposed on people, not an enterprise of the people. From this point of view, family and parish are the more near and stable institutions and they have traditionally carried the main responsibility of people's welfare. The important point here is that this has been seen as the natural way of organising things.

The Bible and Anglican-Puritan Welfare Reforms

British welfare thinking has its roots in the *Statutes of Laborers* under Edward III in 1349 and 1351. In these statutes, the emphasis was, like in the rest of Europe, on the duty to work unless being too young, old, handicapped or ill. This early legislation was followed by others through centuries until Elizabeth I launched her statute in 1601. This statute is generally considered the basis

⁵¹ On the contribution of Catholic social ethics on the Central European welfare model, see Tergel 1987, 39-133; Misra & Hicks 1994, 306-309; Hellemans 2000. On Catholic social thought, see, for example, Dorr (1992), McHugh (2000) and Levillain (2002).

⁵² In Aristotelian ethic other people are seen in relation to an individual's own good life. Accordingly, a human cannot live a good life if she/he treats others badly. This idea has been dominant in Catholic thinking through Thomism.

⁵³ Kopperi 1996, 224-227.

of the modern British welfare tradition⁵⁴. The basic aim behind it was, like in Luther's thinking, the total elimination of poverty⁵⁵. E. Blake Bromley writes:

The Puritans of Tudor England (led by wealthy merchants) wanted to do far more than relieve suffering and poverty. They were content to do nothing less than the eradicate the conditions which gave rise to poverty and sickness and accomplish a social reformation. Although this zeal for social change was religiously motivated, these merchants could see that the church was neither able nor ideally suited to solve the problems of their society and needed a legal mechanism to implement their secular solutions, the charitable trust.⁵⁶

Karl Polanyi, in turn, argues that when the restrictions of free moving from place to place were lifted in England, justices of Speenhamland launched a system of minimum earning level that was paid above salary. During its fifty years, this system proved to be a catastrophe: labourers had no interest in developing their work or skills and employers reduced the wages when the municipality anyway paid the rest. When in 1834 the Parliament launched the *New Poor Law*, it was a reaction to Speenhamland's experiences and the pendulum swung to other end. Not only "the right to live"-doctrine was abandoned but also the old division between the unable-to-work poor and the able ones. All were thrown to the mercy of the markets: to work or to starve. This, in turn, according to Polanyi, gave rise to a countermovement, which was manifested in the emergence of the Labour Movement and the social reforms.⁵⁷

Thus, the main difference to Lutheran territories was that British used voluntary organisations in this task while Lutherans relied on public funds that were funded by confiscated property of monasteries and fraternities as well as by taxes⁵⁸. British system, however, became part of the maintaining status quo in the country. The alliance between the crown, nobles and the Church of England⁵⁹ made the church as a fortress of the upper classes. This, in turn, led to the rise of dissident churches of the lower classes. Contrary to Nordic countries, the revivals of the 18th and 19th centuries did not remain inside the majority church but carved their stream outside the Anglican Church. Thus, when the arising Labour Movement sought legitimacy for its social claims, it did not find sympathy from the upper-class-oriented Church of England but from the lower-class-based dissident churches, especially from Methodism⁶⁰. A significant proportion of the early labour

⁵⁴ On British poor law legislation, see Nicholls (1968), Boyer (1985), Brundage (2002) and Fideler (2003). On Scottish poor law, see Cage (1981) and Mitchison (2000).

⁵⁵ Jordan 1959, 18f., 143.

⁵⁶ Bromley 1994, 173f.

⁵⁷ Polanyi 1944.

⁵⁸ British system, contrary to Lutheran territories, had an inbuilt hindrance to crown's intervention in the matters of its subjects: already in Magna Carta (1215 AD) James II had quarantined the peer rights of the nobles.

⁵⁹ The other name of the Anglican Church, the Established Church, tells a lot of church role in Britain.

⁶⁰ Methodism in the 19th century was an offspring of Calvinism (or its Anglo-Saxon form, Puritanism). In the same time, Methodism was a protest movement against the secularisation and cold heartness of the Anglican Church. It

leaders become from Methodists and nobody could be sure whether a meeting in the labour-house was a religious meeting or the service in the Methodist church was a political meeting.

Anglican Church, however, changed during the early 20th century much due to the impact of the Student Christian Movement, which in turn, carried a strong heritage of the American-born Social Gospel Movement. It is no accident that the first one who ever used the concept of ‘welfare state’ was Archbishop William Temple⁶¹, whose thinking was heavily influenced by Student Christian Movement and its emphasis on Social Gospel⁶².

Puritanism and American Welfare

Like in Britain, the welfare solutions in the United States have been based on the voluntary associations and foundations. Since Alexis de Tocqueville’s notion that “Americans of all ages, all conditions, and all dispositions constantly form associations⁶³,” the United States has been seen as the major home of the nonprofit sector. The American model was founded on the British basis but - as a special spice - there was a strong allergy to strong state and church.

American welfare model has its roots in European refugees who rescued themselves to a new continent. While Protestantism in Europe was fighting for its existence, the early American settlers started to build their version of kingdom of God on earth. It was their experience of being persecuted by the state and church that made them to limit the power of these institutions. As Barry D. Karl argues, “voluntarism became a protection against government, the preservation of the democratic right of individual choice from the regimenting influence of bureaucratic coercion⁶⁴.” This early Puritan heritage can be seen in American society thoroughly⁶⁵. Later, at the end of 19th century, the Social Gospel Movement had an enormous impact on welfare thinking of American churches⁶⁶. In both cases, the inspiration was drawn from the Bible.

was, thus, this protest movement that gave the legitimation to the claims of the emerging Labour Movement. On Methodism and Labour Party, see Wearmouth (1957); Smith L. (1993), Pelling (1965, 129), Brand (1974, 16).

⁶¹ Temple 1940. See also Temple 1942.

⁶² Turner 1991, 976f. Turner (idem.) also mentions that his “stress on corporate sin was learned from Reinhold Niebuhr”, one proponents of the Social Gospel Movement.

⁶³ Tocqueville 1945(1835),115.

⁶⁴ Karl 1984, 515.

⁶⁵ On Puritanism and the American society, see Niebuhr (1937), Gaer and Siegel (1964, 105-155), Perry (1964), Handy (1974), and *Religion and American Politics* (1990).

⁶⁶ On revivalism and social reform, see Smith TL (1976). On American religious philanthropy, see *Faith and Philanthropy in America* (1990), *Welfare in America* (1996).

However, not all founding fathers were religious. Others got their ideas from writings of Aristotle, Cicero, Plato, Thucydides and Xenophon⁶⁷. Especially Cicero has been a role model for American lawyers⁶⁸. While Puritans and proponents of Social Gospel emphasised brotherhood of man and equality of all men, the Greek heritage can be seen in the emphasis on competition and in general treatment of Native American, African American and some other minorities. Especially American slavery has been the closest modern parallel to Greco-Roman forms of slavery⁶⁹.

Peter Dobkin Hall emphasises that before the Civil War there were two major groups that created both for-profit and nonprofit organisations, namely the evangelical network⁷⁰ and Boston merchants. These two groups created organisations, developed administrative skills and created personal and organisational networks that enabled their work⁷¹. When the Civil War broke out, the neither the Union government nor the Army had adequate administration and leadership. In that situation people from the evangelical network and Boston merchants were recruited to reorganise them. The result was that

the Union's victory was seen by its organizers and significant element of the public as a legitimization of the claims of the organized private sector.⁷²

This ensured, according to Hall, that the basic welfare and educational institutions were formed on a private nonprofit basis. When the European governments launched new services to their citizens in order to calm down the challenges of socialism, America developed a model called welfare capitalism in which the nonprofit organisations played a major role. Private companies supported voluntary organisations which in turn launched the welfare projects.⁷³

The Social Gospel movement⁷⁴ at the end of the 19th century emphasised the social teachings of Jesus and saw the Kingdom of God as a 'brotherhood of men' or 'family of God' where justice, peace and unity prevails. The task of Christians, according to this theology, is to implement God's will on earth. For many Social Gospel promoters this simply meant "peace and justice".

⁶⁷ Zvesper 1989; Gummere 1962; MacKendrick 1977.

⁶⁸ Botein 1978.

⁶⁹ Orlando Patterson (1982) notes that "[t]he religion that had begun in and was fashioned by the Roman slave order was to play the identical role eighteen hundred years later in the slave system that was to be Rome's closest cultural counterpart in the modern world."

⁷⁰ On the religious context of the pre civil war situation see, e.g., Yoder 1993(1954) and Smith TL (1976).

⁷¹ Hall 1987,7.

⁷² Hall 1987,8.

⁷³ Hall 1987,8-15.

⁷⁴ On Social Gospel, see Hopkins 1967(1940); White & Hopkins (1976); Handy (1966); Visser 't Hooft (1928); and Niebuhr (1937; 1988).

The welfare capitalism lasted until the 1930s when the great depression hit the country. The basic weakness of welfare capitalism was that in the critical situation the companies first cut out their donations to nonprofit organisations. In this situation the state had to rescue the welfare service sector. The tax legislation, that enabled tax substitutions, traces from this time.⁷⁵

After the Second World War the state became the biggest donor of the nonprofit sector although the services were launched by nonprofit organisations. The growing criticism of the system led to the “1969 Tax Reform Act, which placed the foundations under strict federal oversight.” This in turn was one major catalyst to the emergence of nonprofit studies when large foundations, like Rockefeller, wanted to know how the Act influences their environment.⁷⁶

Since the 1970’s there has been an exponentially growing amount of nonprofit studies and research institutions in the US. While the studies reveal the origins and behaviour of the nonprofit sector, they also give more legitimacy to the American nonprofit model. Due to the American supremacy in social sciences, American political thinking has been creeping into European welfare policy by supplying theoretical frames how to organise welfare in highly competitive surrounding. Especially former socialist countries have been eager to adopt American models.

Conclusion

The European welfare thinking has, as shown above, two basic roots: Oriental communal or co-operative frame and Hellene competitive frame. These two frames were combined in early Christianity and have since then, been in tension through the European history of poor care.

After the merging of these traditions, the development of welfare institutions can be followed – like the path dependency theory states – step by step from Byzantium to the Reformation in 16th century. Previous models were copied and developed but in the same time original Oriental and Greek thinking behind these models was renewed by continuous reading and interpretation of the Bible and the Greek classics (first Plato and then Aristotle). One of the most significant episode was when Thomas Aquinas wrote his *Summa Theologica* and cemented Aristotelian interpretation of the Bible.

Reformation – as well as Enlightenment - caused a partial break in this continuity. Although Luther utilised many older models of poor care, he skipped the Greek classics away and went *ad*

⁷⁵ Hall 1987, 8-17; Andrews 1970, 646.

⁷⁶ Hall 1987, 18ff.

fonts – back to Oriental thinking expressed in the Bible. From that on, there was a clear trend to educate the masses in Protestant countries. Education was seen as a tool to eliminate poverty. The traditionhistorical significance is that while the masses were taught this Oriental frame, elite started more and more read Greek classics – and adopt the world view expressed in them. This led to different combinations of thinking.

In Catholic countries, the alliance between Bible and Aristotle continued when Thomism was the leading paradigm. In Nordic countries Oriental thinking became prevalent locked-in a path that (much later strengthened by other stream of Oriental thinking, namely that of Socialism) led to Nordic (or Social Democratic) welfare model. In Britain, the path started like in Nordic countries but the role of the elite was much stronger and Greek ideas started to take root in the country. Then, in the 19th century, after the Speenhamland episode, Greek competitive values overcome the Oriental ones and the path turned to liberal Anglo-Saxon model.

In America, the path to liberal welfare state was a bit different but the outcome was similar. When Protestantism fought for survival in Europe, refugees in America were determined to limit the power of their former oppressors, the state and the church. In the same time, like their British peers, American elite adopted classical models – not from Sparta as British did but from Rome. In the same way, as in Britain, Methodism and other dissident churches cared for the poor and, thus, the welfare model in America became to be based on the churches and voluntary associations.

In this way, we can see that the three welfare regimes of Esping-Andersen are all rooted from the same origins but the paths of development differed. In different historical moments, different societies choose to emphasise either communalism or competitiveness – or some combination of these. After the paths separated during the 16th century, they continued to go forward in their own direction.

Churches are, in part, responsible of these different directions. However, if Clifford Geertz' thesis is right, religions are both *models of* the society and *models for* the society. In other words, religions interact with societies, adopt their customs and values and sacralise them. After that, they provide a powerful value-system that forms the basic of the social ethics of the same societies.

During the late 20th and early 21st centuries European unification has led to a situation where both people interact across (cultural) borders more than ever before. Like before, this leads to exchange of ideas and harmonisation of thinking – including welfare thinking. In political level, there is a great danger that the strong and the mighty try to press their frame into the European

Union legislation. Normally, this sort of pressure leads to either surrender or strengthened opposition and neither option is desirable when building common Europe.

My attempt here has been to show that below the surface, there lays a common ground in all European welfare models. It is the interpretation of Oriental values with Greek philosophy. Harmonisation of welfare is possible only if it can be legitimised through this common ground. Focusing on the core values gives possibility to separate the essentials from the peripheral.

Abbreviations of Biblical and Classical Texts

All Biblical quotations are from The Holy Bible. New International Version. International Bible Society 1984.

Available at <http://www.biblegateway.com/passage/?search=> (24.9.2006)

Classical texts are from the Perseus Digital Library, http://www.perseus.tufts.edu/cache/perscoll_Greco-Roman.html (25.9.2006)

Aristot. Nic. Eth – Aristotele: Nicomachean Ethics.

Aristot. Pol – Aristoteles: Politics.

Deut – Deuteronomy.

Hdt. – Herodotos: The Histories.

Luk – Gospel of Luke.

Plat.Law. – Plato: Laws.

Plat.Rep. – Plato: Republic.

Rom. – Paul’s Letter to Romans.

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