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The invisible politics of religion:

Catholic Third sector and territorial welfare in the Basque Country and Italy

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Abstract: *Interactions between politics and religion are frequently reduced to mediatised and politicized ethical and civilizational issues. Focusing instead on the role of religions - here Catholics - actors in the local experiences of social economy and welfare in times of economic crisis helps instead to highlight the discrete interactions between politics and religion. In particular, the strong involvement of religious actors, beyond their traditional charity-oriented activity, also concerns more solidarity-oriented socioeconomic experiences as well as political advocacy. These articulations generate new forms of politicization with respect to both social movements and policy makers. These issues are addressed here comparatively in a Spanish (Basque Autonomous Community) and an Italian (Emilia-Romagna) region.*

Interaction¹ between religion and politics tend frequently to be reduced to the highly politicized ethical and civilizational controversies. However, there is also a need to address a less visible but essential dimension of the Churches' activities, namely their role in the arena of social services and welfare. The case-studies which will be discussed here aim at contributing to a set of research devoted to the social work of religious organizations and to the role of religion in the shaping of European and national welfare regimes. Kersbergern and Manow (2009) have introduced a new perspective on the way religion shaped the modern social protection systems by addressing the interplay of societal cleavage structure, electoral rules and religion in the different welfare regimes in the Western world. The WREP project addressed the changing nature of both religion and welfare in Europe, highlighting the increased visibility of religion in the public sphere, the anxieties of European populations about the welfare state and the centrality of gender to both questions (Bäckstrom, Davie et al., 2011). In the same vein, Bassi and Pfau-Effinger (2012) and Lynch (2009) introduced new perspective concerning the role of religion, both as an institution and as a set of doctrines, in shaping the Italian and European welfare systems. These national

¹ This paper was first discussed at the ECPR General conference, Bordeaux 5-7 September 2013 (Section *Regulating private and public: between religion and secularism*).

perspectives have been complemented by territorial focuses, like the analysis of the Catholic third sector's social and/or political dimensions in Bologna (Colozzi et Martelli 1988), Vicenza (Frisina 2010), in Lombardy (Giorgi 2012; Muehlebach 2012) or in Tarragona (Belzunegui et al. 2011).

Against this background, the ambition of this paper is a limited one. Rather than addressing the impact of religion on the national welfare regimes, I argue that, at least in the two Spanish and Italian regions under consideration here, the economic crisis starting in 2008 has been the stage of a redeployment of the social role of the Catholic third sector at the local level, thus redefining its relations with the public sector, with social movements and revealing incidentally its own internal pluralism. This highly significant social role of the Catholic third sector will be considered here in two particularly secularized – according to the classical indicators – regions, Emilia-Romagna in Italy and the Basque Autonomous community in Spain, with a focus on the provinces of Forlì-Cesena and Biscaye. These two case-studies illustrate the necessity to go beyond the simplifying approaches of the secularization of the European public spheres in order to address properly the new social role of religious organizations in a postsecular context².

This paper relies on an ongoing qualitative research conducted in both territories. Secondary data were recorded on the local religious landscape; the socio-economic situation; third sector organizations. Primary data were collected through personal interviews. In Italy, I conducted in 2013 14 semi-structured interviews in Forlì and 1 in Bologna with: the Social Pastoral Care of the Diocese of Forlì-Bertinoro, Caritas, the Consortium of social cooperatives *Consorzio Solidarietà Sociale* (CSS), AICCON, the ACLI³, the Romanian Greek-Catholic Church, the Adventist Church, the City councilor for welfare in Forlì; 2 organizations working with migrants, University experts. I attended the presentation of the 2013 Caritas Forlì-Bertinoro report on poverty and resources (Forlì, 29 April 2013), the debate over the properties confiscated to the Mafia in Forlì (May 2013); the presentation of the Caritas Europe report on poverty in Southern Europe and Ireland (*Terra futura*, Florence 17-19 May 2013); and the 40th anniversary of Caritas Florence (2012)⁴. In the Spanish Basque Country, I conducted in 2012-2013 12 semi-structured interviews in Bilbao with: Fiare Banca Etica, Caritas Bizkaia, Bultz-lan, the Jesuit NGO Alboan, Centro Ignacio Ellacuria, Social and Workers' Pastoral services of the Diocese of Bilbao, Christian collective Bidari, University experts; in San Sebastián with the collective Eutsi Berrituz. These interviews updated those realized in 2002-2003 and 2009 with Catholic organizations working with migrants (Dorangricchia and Itçaina 2005) (Itçaina and Burchianti 2011) and with peace movement (Itçaina 2013)⁵.

² In the sense given by Rosati and Stoëckl (2012), who propose to enrich Habermas' approach to the postsecular as a process of complementary learning between religious and secular worldviews and practices by including : “reflectivity of both secular modernities and religious traditions, co-existence of secular and religious worldviews and practices, de-privatization of religions, religious pluralism vs. religious monopoly, and the sacred understood (also) as a heteronomous transcendent force vs. only immanent understanding of it” (p. 6).

³ *Associazione di lavoratori cristiani italiani*

⁴ In addition, I did sample interviews in Brescia (Lombardy) in July 2013 with Caritas, the Social Pastoral of the Diocese, ACLI and Confcooperative.

⁵ This fieldwork is part of a research project whose completion was made possible thanks to a two years stay at the European University Institute in Florence and the support of the European Commission under a Marie Curie Intra-European Fellowship. I thank Donatella della Porta and Andrea Bassi for their support and suggestions.

The paper is structured as follows. Section 1 contextualizes the two compared territories. Section 2 considers the crisis as a constrained opportunity for the Catholic Third sector. Section 3 addresses the interactions between the Catholic third sector and public authorities. Section 4 proposes concluding remarks and further research avenues.

1. Catholic dynamism in postsecular societies

This section contextualizes the territorial comparison. According to classical indicators, both Emilia-Romagna and the Basque Country are among the most secularized regions in Italy and Spain. However, this weakening of the classical features does not mean that the Catholic third sector has become a residual player, on the contrary. This contrasts emanates also from a partial secularization of the Catholic organizations as resulting from a process of mutual learning with secular organizations (Rosati and Stöeckl 2012) and from the internal pluralism of the “Catholic archipelago” (Colozzi and Martelli 1988).

1.1. Two secularized societies?

Even if deemed insufficient, classical indicators on secularization constitute a starting point in order to contextualize the comparison. These data give a first picture of two very secularized regions. Cartocci (2011: 42) evidences that Emilia-Romagna, along with Tuscany and Liguria, ranked in 2009 among the regions with the weakest rates of Church attendance, between the more Catholic Northern and Southern regions. Similar ranking could be observed concerning civil marriage, attendance to religious teaching in schools, and the individual choices concerning the allocation of the proportion of the income tax (*8 per mille*) to the Catholic Church. According to Cartocci’s aggregated index of secularization⁶, the province of Forlì-Cesena ranked 19 out of the 110 Italian provinces. In Spain, the Basque provinces, after having been among the most Catholic areas of Spain until the early 1970s, have undergone a process of quick secularization during the democratic transition, a process which has been more pronounced than in the rest of Spain (Pérez-Agote 2006: 110). Together with the socioeconomical changes, both these processes were commonly referred to the territorial political cultures. In Emilia-Romagna, the socialist-communist and – particularly in Romagna – republican subcultures certainly played a role in this respect, together with a certain anticlericalism going back to the pre-1860 period, when Romagna was part of the Pontifical States. On the contrary, Basque nationalism, after having been a very Catholic one, did not undergo through a process of internal secularization before the 1960-1970s.

At the same time, both Emilia Romagna and the Basque Country ranked among the first regions in Italy (Cartocci 2007) and Spain (Mota and Subirats 2000) concerning levels of social capital. The problems raised by such measurements are well-known: the choice of the indicators is questionable, and the ranking of social capital doesn’t say a lot about the effectiveness and the virtuous *vs.* vicious nature of the social linkages and networks (Ritaine 2001). Keeping these

⁶ Decline of the centrality of the Catholic Church, shrinking of religious attendance, of religious marriage and of trust in Church (Cartocci 2011: 25).

caveats in mind, what remains true is that both regions were signalled by very dynamic civil societies and organized secular *and* religious associations. In particular, both Emilia Romagna and the Basque Country were characterized by a consolidated tradition of social economy, as referring to the set of organizations developing an economic activity located “between” the public sector and the private for-profit sector. Social economy was historically related to political and religious subcultures in both regions, even if this connection was more institutionalized in Italy than in Spain⁷.

1.2. Two dynamic Catholic networks

Classical indicators of secularizations, while providing a useful insight for a first comparative attempt, do only provide a contextual perspective thus neglecting the properly religious dynamics that are at stake⁸. In both regions, the decline of church attendance did not prevent from a consolidated presence of the Catholic networks (Giorgi 2012: 336) in education and social services, but also in social and solidarity economy. Both the provinces of Forlì-Cesena and Biscaye present a varied picture of Catholic organisations working in the territorial welfare, with a whole range of institutional affiliations that could be summed up as follows:

- a) Direct institutional affiliation: Caritas, religious congregations, Diocesan institutions
- b) Informal parish groups and self-organized Christian grass-roots communities
- c) Catholic Action lay movements
- d) Organizations historically emanating from social Catholicism (social cooperatives belonging to Federsolidarietà, ACLI)
- e) specialized secular organizations founded for functional purposes by Church organizations (social integration companies, consulting companies, social businesses),
- f) secular organizations resulting from the fusion of secular and religiously inspired organizations
- g) secular organizations referring to the charisma of a Catholic founder (as the *Centro per la Pace Annalena Tonelli* in Forlì).

From an institutional perspective, this range of affiliations to the Catholic nebula has consequences upon the governance design of every organization. A social cooperative sets up its governance design, in an autonomous way, upon the cooperative principles while collaborating with the diocesan apparatus. A religious congregation relies on the priorities given to the social sector by its hierarchy organized along specific territorial jurisdictions (as the Jesuit Province).

⁷ In the Basque Country, the first cooperatives emanated, in the late XIXth century, from the socialist movement. The emblematic Mondragon experience emerged in the 1950s from an atypical social Catholicism mixed with Basque identity and anti-Francoism. In Emilia-Romagna, the cooperative movement was – and is still, despite a recent rapprochement – structured around three ideological poles: the socialist-communist pole (Legacoop), the Catholic pole (Confcooperative) and the minor Republican one (ACGI) (Menzani 2007). The Confcooperative-Federsolidarietà model of social cooperatives (the CSS consortium in Forlì since 1985) was characterized whole by small-scale social cooperatives, with a complete territorial coverage and model of diffusion (the “strawberry fields” model) and a high presence of volunteering.

⁸ See Abruzzese’s criticism of Cartocci (Abruzzese 2012).

Caritas depends on the policy choices made by the bishop, especially, in Italy, concerning the allocation of the *8 per mille*⁹, even if this leadership is regulated by institutionalized advisory processes, as mentioned by Caritas Forlì's representative:

“Caritas, as all the ecclesial structures, is not a democratic structure. They are vertical structures. Whereas in a cooperative it's ‘one person, one vote’, in the Church, there is a hierarchical organization. Pope, bishop, director of offices, director of Caritas... But this has also been theorized by the Church: when they have to make a decision, they have to surround themselves with advisory boards, which must express their views. This advisory vote is strongly requested. The Church leaders are asked to listen to the base. But the final decision remains in their hands, there is no voting.”¹⁰

On the other end of the spectrum, some organizations experienced a process of internal secularization, while still referring to a Christian background as a set of values. In Forlì, the Consortium of Social Cooperatives, while acknowledging its historical roots, did not define itself as being institutionally part of the Church, given its own internal pluralism:

“From a statutory point of view, the Consortium refers to the Social doctrine of the Church. It refers to some values, so to speak, to typical sentences from the cooperative world, the most original ones. I don't say old, I say original. I am thinking, for instance, to a beautiful passage mentioning the pursuit of utopia. Or economic democracy. But it is clear as well that the Consortium, as being a network of companies, had always this reference, but without never practicing neither *collateralismo* nor exclusion. This did never characterize the identity of the Consortium. To the point where, even if we have a long story of collaboration with Caritas and with the diocese – I am part, for instance, as president of the Consortium, of a diocesan body representing the associations working in this sector –, I can hardly define myself as a service project or as an initiative belonging to the Catholic area. If I did so, I would probably offence one of my members who do not have this explicit reference. (...) There is certainly a cultural reference to the social doctrine of the Church, but in a very secular sense.”¹¹

This flexibility proved to be effective in the answer provided by the Catholic third sector to the crisis.

1.3. Wealthy regions facing the crisis

Both regions have been long seen as leaders in terms of regional socio-economic development in their respective countries. Emilia-Romagna and the Basque region were frequently quoted in the literature on regional studies as virtuous examples of local development based, in the Italian case, on SMEs, industrial districts, cooperatives and the so-called Emilian model of local development (Restakis 2010). In the Basque Country the cluster policy designed by the Basque Government in the 1990s, in collaboration with the industrial cooperatives, had been the key of the exit from the previous economic crisis. Despite their paradigmatic dimension, both regions were caught up by the 2008 crisis, even if to a lesser extent than their national counterparts. Tensions were sensitive on the labour market, with a decrease in regional productivities and increasing unemployment. In

⁹ Whereas in Spain, taxpayers choose to attribute the 0,7% :a) to the Catholic Church, b) to the NGOs, among them the Catholic ones, c) to both of them, d) to neither one of them.

¹⁰ Personal interview. Coordinator of Caritas Forlì-Bertinoro, Forlì, 22 February 2013, translated from Italian.

¹¹ Personal interview, president of the Consorzio Solidarietà Sociale, Forlì, 22 March 2013. Translated from Italian.

Emilia-Romagna, unemployment rate was 2.9% in 2007 and 7.1 in 2012¹². The unemployment rate in the province of Forlì-Cesena was 7% in May 2012¹³. In March 2013, there were 35,433 unemployed, an increase of +61% from 2008. The situation was more critical in the Basque Country. In April 2013, there were 164,700 registered unemployed in the Basque Autonomous Community, which represented an unemployment rate of 16,28% (27,16% in Spain)¹⁴ (Biscaye: 18,03%, Alava:16,37%, Guipuzcoa:13,27%). The crisis was relatively better supported in the Basque Country than in the rest of Spain because of an efficient public welfare system and a well-structured Third sector. However, these factors didn't prevent an undeniable deterioration.

2. Beyond charity: the social work undertaken by Catholic organizations

2.1. Caritas between a vanguard role and primary provider

As other voluntary organizations, Churches have different functions as regards national and territorial welfare systems: "In the *vanguard role*, the church acts in the frontline, highlighting new areas of need and prioritizing forgotten groups of people. As an *improver*, the focus is on the enhancement of existing welfare provision in order to increase different aspects of its quality. In its role as *value guardian*, the church acts as a defender of, and advocate for, various human values (...) The *service-provider* role, finally, can itself be of three different kinds (...). As a primary provider, the church is either the sole provider or among the main providers, of a certain kind of welfare. If the church is offering services which are qualitatively different from what is provided by the public welfare system, these can be labeled complementary services. When the church-provided service is simply an alternative choice, a substitute for the same service offered by the state, it offers a supplementary welfare service"(Pettersen 2011: 33).

A first common feature of the Basque and Romagna church organizations is the strong commitment of church organizations in providing basic welfare services. As observed by Frisina (2010) in Vicenza, this role of organizations as primary providers goes together with a vanguard role. Caritas was, in particular, the central actor working on the frontline for the provision of basic welfare services and for highlighting new areas of need. The consequences of the crisis, in this respect, can be measured in three phenomena on both territories.

The first one is the quantitative and qualitative change in the users of Caritas' immediate aid. The current crisis exacerbated inequalities - that had been deepening during the period of economic growth - by its extensive, intensive and chronic dimensions. In Forlì, the 25 'Listening centres' of the diocesan Caritas received 4,661 persons and 1,963 families in 2009, and 6,661 persons, 1,991 families and 45,323 transients in 2012 (Diocesi di Forlì-Bertinoro 2013: 22). In Biscaye, 13,002 persons participated to the projects of Caritas in 2012, 4,723 of them for the first time (Cáritas Bizkaia 2013). The profile of the users of Caritas' services changed. If the traditional profiles were still present (migrants, single women, homeless people), the crisis brought new

¹² Unioncamere Emilia-Romagna, *Rapporto sull'economia regionale. Consuntivo 2012*, p. 42.

¹³ "Crisi senza fine, a Forlì tasso di disoccupazione al 7%", *Forlì today*, 21 May 2012.

¹⁴ "La tasa de paro llega en Euskadi al 16,28% en el primer trimestre de 2013", *El Mundo*, 25 April 2013.

forms of precariousness: middle-class singles or families, seniors, precarious workers. The crisis also impacted the fluxes of migrants coming to Caritas. In Forlì, with the crisis, Caritas saw the return of former users who in the 1990s had found a job and who had reunified their family. Equally, the number of asylum seekers coming to Caritas started to decrease since 2008, not because the fluxes were diminishing, but because the territory had become a transit point. By contrast, the number of Italian users of Caritas services increased from 23,35 % in 2011 to 26,24% in 2012 (Diocesi di Forlì-Bertinoro, 2013: 21). In Bilbao, the number of EU citizens coming to Caritas increased by 42,6% between 2010 and 2012, while the number of non-EU nationals, while still representing the majority of users in 2012 (54,4%), decreased by 18% between 2010 and 2012 (Cáritas Bizkaia 2013). On both territories, this change had psychological consequences. Whereas for many vulnerable populations, and specially migrants, coming to the Caritas was a sign of hope, on the contrary resorting to Caritas constituted a very difficult, if not traumatic, experience for many people experiencing poverty for the first time. The feeling of shame was mentioned by our interviewees in Bilbao as in Forlì. As explained by a social worker of Caritas in Forlì:

“When I started working in this service in 2007, I was struck by the diversity of visions between the Italians and the foreigners. In the sense that, when the foreigners presented themselves to the Caritas, there was a hope of improvement in their eyes. Because they came here to find a better life. To find a job, to send money home, to call their family, etc. [coming to Caritas] was a temporary solution, before improving their condition. The Italians, at that time, were those who had not made it, those who had tried everything, with situations of dependencies, former prisoners, others who were mentally sick, etc ... Now, on the contrary, those Italians are still there, but the majority is constituted by normal persons, your neighbour, your friends, people who lost their job, separate couples, who cannot make it anymore. And they feel ashamed. Because one thing is the homeless person, who has always lived like this, or the drug-addict living by his wits. These ones do not feel ashamed anymore. But for the normal persons for whom Caritas is for the *barboni* (homeless), there is shame.”¹⁵

Secondly, and as a consequence, both Caritas had to adapt their answer and their services to these new fluxes. In Bilbao, Caritas felt the reality of the crisis as soon as 2008 through the initial reception in parishes and Caritas local centres and the distribution of the basic economic aid. In mid-June 2008, the budget for 2008 for basic aid had already been spent, although being twice as much as the previous year. In 2007, Caritas Biscaye helped 7,000 persons and distributed 700,000 € of basic economic aid. In 2009, 11,000 people were helped, but the aid had grown exponentially, reaching 2 million €. Not only the number of people in need increased, but also the needs themselves. Before the crisis, the persons came to Caritas as a transition before acceding to the social benefits provided by the public welfare. This transitional situation became a structural one, and Caritas had to set up a food voucher system, in collaboration with the major Basque consumer cooperative Eroski and the cooperative bank Caja Laboral. Equally, Caritas set up a voucher system for clothes, in collaboration with the Koopera cooperative. The system was conceived as a way to save the persons' dignity: rather than *giving* food or clothes, the persons went to *buy* them. Caritas also opened a social canteen in Baracaldo, one of the industrial zones hard hit by the crisis. In Forlì, Caritas Forlì created a special solidarity fund funded by banking foundations, the diocese and fundraising in parishes, in order to answer to the increasing needs.

¹⁵ Personal interview, social worker of Caritas Forlì-Bertinoro, 8 May 2013. Translated from Italian.

Thirdly, as a solidarity effect, the crisis provoked a slight increase in volunteering and in donations to Caritas. This was particularly visible in Bilbao, where the number of volunteers working with the 138 professional workers of Caritas increased by 3,16% between 2011 and 2012, with 337 new volunteers on a total of 2,444 (with 81% of women). The number of members and donors of *Cáritas Bizkaia* increased by 8,6% between 2011 and 2012, thus amounting to a total of 5121 (with 47,7% of women) (*Cáritas Bizkaia* 2013). Along with the traditional social and gendered profiles of volunteers (Bäckstrom, Davie and al. 2011), new profiles appeared: doctors, lawyers, journalists, willing to share their knowledge. Private companies, rather than giving money, proposed their expertise for free. In Forlì, at the time of our fieldwork, the diocesan Caritas associated 12 professional workers and about 100 volunteers. Among the latter was an important quota of pensioners, of people volunteering as an alternative to imprisonment, but also professionals and University students.

2.2. Beyond charity: solidarity economy as empowerment

Catholic organizations, even if pressured, were not confined to basic assistance. All the organizations encountered in Bilbao as in Forlì refused firmly to describe their role as being confined to mere charity. Rather, they aimed at accompanying people in need through a process of co-construction of personal and collective itineraries towards social inclusion. Even the first help, if totally free, was not unconditional: board and lodging were delivered in exchange of a commitment of the recipient to leave aside his/her addictions, to engage in job search, or in community engagement. Beyond the expected moralizing dimension, anthropologists would see there a gift/counter gift sequence transferred to the third sector – what Godbout (2000) calls the “gift to foreigners” -, where the relation between the donor and the recipient should last far beyond the single material exchange.

This process of accompanying pushed Catholic organizations to innovate in the field of social and solidarity economy, with a number of small-scale experiments. Interviewees in both regions related the current Catholic initiatives to the “solidarity” or to the “alternative” economy, whereas “traditional” cooperatives were described as being part of a more market-oriented social economy¹⁶. Here as well, it is Caritas who spearhead these initiatives on both territories. In Forlì, the crisis pushed Caritas and the Social pastoral to promote a series of experiences framed as contributing to an “economy of proximity” based on informal solidarity, and rejecting both the dependence on public subsidies – which, in any case, were reduced – *and* the traditional charity of the Church. Rather, the objective was to build equal interpersonal relationships. Beyond material exchanges, non-material and non monetizable forms of relations were promoted: family-tutors, reception of migrants by local families, etc. Caritas Forlì-Bertinoro launched a second-hand market where persons could bring used objects, exchange them for a token in order to “buy” another object on the market. Unlike classical swap market, there was no calculation of monetary equivalence: a pen was of equal value to a computer, considering that the monetary value had disappeared with the end of the personal use of the device. The relation of exchange was not a dyadic one, rather a circular solidarity. Empowerment was also at the heart of the microcredit scheme established by the Caritas Forlì with an Italian financial institute working on the Yunus

¹⁶ In several cases however, in Emilia Romagna as in the Basque Country, non social cooperatives also reacted to the crisis by collective wage-cuts rather than lay-offs.

model: small 5-years loans (between 6000-12.000€) with preferential terms, were attributed to persons with small business project and expected opportunity for employment, Caritas playing a role as a guarantee. The targets were those projects which would have been refused by the classical financial circuits due to the lack of guarantee.

While Caritas and some religious orders, like the Capuchins friars in Forlì –before they left in 2012 - or the Sisters of Charity of St. Vincent in Forlimpopoli, were focused on the delivery of primary services, the Consortium of social cooperatives would concentrate themselves on working integration and social business, social housing, or fair trade and ethical consumption with the Apebianca experience initiated in 2011. Caritas also launched a partnership with the Papa Giovanni XXIII Community, which opened a dormitory. Division of labour also came from differentiated public support. If some associations were subsidized directly by the municipality, which paid a quote-part for every user they sent, this was not the case in Caritas, which, despite a small-scale agreement with the municipality, depended in majority on private and Church donations.

Finally, and from a normative perspective, the crisis was read by the Catholic third sector in Forlì as a structural one, requiring structural changes at the societal *and* individual level. Close to the discourse on sustainable decrease promoted by environmentalists, the concept of “voluntary simplicity”, presented by Caritas as a typically Catholic one, promoted the decrease of excessive consumption, the reduction of the working time and the priority given to family life¹⁷. The proximity, on this aspect, with social movements entailed the participation to common networks. Caritas supported in particular the solidarity purchasing groups GAS (*gruppo di acquisti solidale*) that made bulk purchases in order to guarantee a decent prize to local farmers or to social cooperatives from the South working in the lands confiscated to the Mafia (Buccolo 2013). Many of the GAS were initiated informally by local parish groups, which contributes to blurring the frontier between Catholic and secular initiatives. Caritas also played a role for a while in labour market intermediation on the domestic sector, essentially between Italian families and immigrant women. Given the high levels of undeclared work in this sector (Scrinzi 2008), the provincial association of Catholic workers ACLI provided assistance for the regulation of work contracts. The Consortium of social cooperatives and the social cooperative Dia-Logos launched as well an assistance office for domestic workers.

A similar orientation towards solidarity economy could be found in Biscaye. If any, the difference with the Italian case would come from demographics (1.155.772 inhabitants in Biscaye in 2010, 395.489 in Forlì-Cesena) and from unemployment rates (18% in Biscaye in 2013, 7% in Forlì-Cesena), which implied a change of scale in terms of socio-economic answers. But the basic inspirations remained similar ones, as expressed by the Diocesan delegate for Caritas Bizkaia:

« The idea of Caritas goes against the common imaginary. Caritas gives food and clothes. No. The idea of Caritas is to give neither food nor clothes. If there is a situation of emergency, Caritas provides emergency aid. But Caritas' work wants to be a support in accompanying. Helping persons. Why is he/she in such a situation? Empowerment. The person has to discover in his self

¹⁷ The same concept, translated in Basque as “*desazkundera*”, lies at the heart of the Bidari Christian community's reflections in Bilbao (interview).

his own internal resources to escape this situation. Caritas needs to accompany. It is not that much charity, even if in some cases there is a need to do it, but accompanying, promoting.”¹⁸

In Bilbao, beyond the basic needs, Caritas did reinforce its employment programme Gizalan, founded in 1988 in collaboration with the Carmen Gandarias Foundation. Within this frame, Caritas created more than 100 jobs over the last years, for persons having difficulties to comply with the requirements of the welfare benefit or for migrants lacking a stable situation. A cooperative for women working in the domestic sector was set up, together with a service of legal consultancy. A social housing project was launched. As in Forli, these initiatives were undergone either by the Catholic organizations alone, or in network with secular organizations. Among the first category would rank the Bultz lan experience. This consulting company, owned in 2013 at 95% by Caritas Bizkaia was created by the Church of Biscaye in 1983 after the major floods in Biscaye. Oriented towards job and business creation, Bultz-lan developed its action in the Basque Country, in the rest of Spain and in Latin America, helping Basque non- *and* for-profit businesses to establish in Latin America, or supporting working integration initiatives in the Basque Country¹⁹. Bultz-lan illustrated a Catholic social commitment oriented towards business development.

Other experiences promoted by the Church of Biscaye were closer to the “alternative economy” – an expression frequently referred to by interviewees -. The promotion of fair trade started in the end of the 1990s. Logically, the Church organizations working in the Third world were on the frontline in this respect. Two fair trade stores (Kidenda) promoted by Caritas, the Diocesan Missions and the Jesuit NGO Alboan opened in Bilbao. Caritas contributed to the birth of Kooperera, an aggregation of social initiative cooperatives and social businesses, providing 2nd hand goods and environmental services. In 2013, 200 persons, half of them in social integration, were working in Kooperera. This commitment was also testified by the participation of Catholic organizations in secular networks, like the Basque network of solidarity economy (REAS). A very similar organizational evolution from mere charity to empowerment was experienced by some religious congregations. The Escolapios in Bilbao created the Itaka foundation in order to address new social needs, and launched the Peñascal Foundation as an economic reinsertion structure. In the case of the Jesuits, their evolution towards social commitment came from their transnational experience. The social sector of the Jesuit province of Loyola had been weakening since the departure of its most committed members in the 1970s. A new generation of Basque Jesuits, back from Latin America, revitalized the social sector of the Society in the mid-1990s and founded the Alboan NGO for international cooperation in Bilbao, the Ignacio Ellacuria Centre for migrants in Bilbao, and the Loiola Etxea for ex-detainees in Donostia. These organizations were to be on the frontline since the beginning of the crisis.

One of the most significant experiences concerned ethical finance. The ethical bank Fiare started in Bilbao in 2002-2003 before extending to the whole Spain, and its role increased during the economic crisis. Fiare testified a process of mutual learning between Southern European experiences, as it was designed on the Italian model of the Banca Popolare Etica, to the point where becoming the Spanish branch of the Italian bank. Even if totally secular, Fiare had two

¹⁸ Personal interview, Bilbao, 19 June 2013. Translated from Spanish.

¹⁹ Like the Jazkilan textile cooperative, the Kooperera cooperative for recycling material or the Gaztempresa foundation in partnership with the Caja laboral.

origins: the Basque networks of solidarity economy on the one hand, and the most progressive sectors of the Basque (Biscayan in particular) Church. In 2012, among the 48 organizations members of Fiare in Euskadi, 23 at least were institutionally related to the Church (Caritas, dioceses, parishes, congregations, foundations, schools, associations of parents, lay communities)²⁰. Equally, 33 out of the 80 members of the Fiare Foundation that backed the project were institutionally related to the Church. According to one of its founding members, Fiare gained its “reputational legitimacy” from the Catholic organizations, and constituted an illustration of a process of postsecular complementary learning process from religious and secular actors.

Finally, as observed in Romagna, Basque Catholic organizations considered the crisis as a structural one, thus challenging the sustainability of the whole socioeconomic system. Caritas campaigns targeted part of its campaigns towards individual behaviors. A structural equivalent to the Italian discourse on the “voluntary sobriety” was expressed in the *Caritas española* campaign “*Vivir con sencillez*” (living simply), or in the Basque campaign “*nik zer egin dezaket?*” (“what can I do myself?”), in order to promote volunteerism and donations but also sober ways of life. In a typical Catholic style (Tosi and Vitale 2009), the responsibility of the crisis was not framed as lying exclusively with the public institutions and the market forces, but also with the individual direct responsibility.

To sum up, in both territories, the economic crisis a) provoked a situation of lasting emergency for the Catholic third sector; b) which they faced by using existing tools and by innovating; c) rather than single charity, organizations promoted forms of empowerment; d) the crisis was the occasion for promoting voluntary simplicity, that brought Church organizations close to the promoters of sustainable decrease; e) from the doctrinal point of view, this equilibrium between charity and empowerment was justified by the reference to the social teaching of the Church (as the *Caritas in veritate* 2009 encyclical). These references were mixed with others, depending on the charisma of every organization and on territorial contexts. Apart from religious references, in Forlì, several references were made by interviewees and in Diocesan reports to the “school of Bologna” on social economy and civil economy (Bruni and Zamagni 2010). In Bilbao, the Jesuit social presence in was based on a revised formulation of the Theology of Liberation, following *inter alia* the teaching of Ignacio Ellacuria, himself a Basque Jesuit priest killed in San Salvador in 1989, who gave the priority to the agency of the old and new “popular majorities”.

3. Catholic social work and public authorities: between subsidiarity, expertise and advocacy

This social activism of the Church organizations in times of crisis raises the issue of the relations to policy-makers. These interactions can be addressed according to a three pronged approach. The first one concerns the nature of the relation between religious organizations and the public

²⁰ There was also a significative presence (6 out of 18) of organizations with a Catholic background among the founding members of the Italian Banca Popolare Etica <http://www.bancaetica.it/chi-siamo/storia>, accessed on 29 July 2013.

institutions on welfare provision. The second focusses on the advocacy role of the Catholic organizations. Finally, the outcomes of the campaigning activity will be assessed.

3.1. Subsidiarity/substitution?

Pettersen (2011) has emphasized that the relevant factor to understand these interactions lies more in the style of the welfare governance style implemented on the territories rather than in the Church-state national models. In that sense, Italy and Spain, as Mediterranean welfare states, are both characterized by the relevance of religious actors in private action for the family and the poor, even if the increase of the state welfare in the last decades has relegated the charitable action of the Church to an important but complementary role (Moreno 2006: 74). Simultaneously however, the Southern welfare has in recent times experienced a pattern of liberalization in the delivery of welfare services, which had as an effect “a certain extension of free market morals, in the proliferation of ‘non-profit making’ – but characteristically subsidized – NGOs and other providers within the Third Sector, and the reinforcement of welfare privatization.” (Moreno 2006: 77). In a sense, the *liberalization* of welfare – and particularly the externalization of care services - took back to the forefront religious organizations – this time as third sector organizations - that the *secularization* of welfare had previously sidelined.

This general trend was rendered more complex by the processes of devolution of welfare experienced by both countries, thus raising concerns about potential territorial inequalities²¹. In Spain, the asymmetrical decentralization led to the consolidation of regional welfare regimes (Gallego, Gomà, Subirats 2009). As a result of their institutional capacity, the public welfare system was significantly better in the Basque Country and in Navarra than in many other regions. In this case, the pay-off from policy innovation by substate governments with a degree of fiscal autonomy exceeded the advantages of uniformity (Moreno 2006). The Basque welfare was characterized as well by the consolidated cooperation between the regional government and the third sector. During the industrial crisis of the 1980s, Caritas had played a pioneer role in the Basque Parliament in the preparation of the 2/1990 bill that introduced a minimum income for social exclusion in the Basque legislation. This role of public institutions and the associative network prevented the 2008 crisis from being as destructive as elsewhere. But the austerity policies were to be implemented here as well, even if later in time and despite a resistance of the Basque government especially on health care expenditures. In December 2011, the Basque authorities restricted the criteria to access the minimum income benefit²², notably for migrants’ period of official registration of residence. In such a context, the social work of the Catholic organizations became more important than ever.

When dealing with this risk of dismantling of the welfare model, the Catholic organizations saw their role as oscillating between subsidiarity and substitution:

“The poor have to be cared by public administration. The public resources need to be redistributed through social policies. Not only with development policies. We are not here to compensate what the administration has to do. We are here to complement what the administration does not manage to comply once they have taken the right path. Or to indicate, as

²¹ See Colozzi (2012: 108) on the Italian debate following the reform of Title V of the Constitution in 2001 and the risk of differentiated regional welfare systems.

²² « Euskadi endurecerà el acceso a la renta mínima », *Publico.es* 13 September 2011.

spearheads, what should be done, thanks to significant actions. We usually say in *Caritas española*: if we made it, it can be done. Do it! And this has a lot to do with the social awareness. (...) In this sense, we do subsidiarity. We complement what should be done by the administration. Not because they don't have to do it, not to make them feel secure because the Church is doing it. No. This is where denunciation starts. It's up to you. We go out. We do, but not for ever. When the administration will do it, we will retire."²³

A similar position was encountered in Emilia Romagna. At the Italian level, the increasing role of third sector organizations in the delivery of social services had been reinforced by the regional devolution since the 1970s. However, the regions could only provide very limited funding the new services falling under their jurisdiction (primarily social assistance and social care services, health care), and they left the financial burden with local authorities (Fargion 2009: 136). Municipalities increasingly turned to the third sector, and especially to the non-profit organizations, particularly cooperatives, whose creation was frequently stimulated by the local authorities:

“Co-operatives could easily provide a wide range of services, including home help, while also addressing youth unemployment. The outcome was an intricate web of public-private arrangements, not only where the Christian Democrats had power but also in leftist regions such as Tuscany and Emilia Romagna, which originally attempted at creating an Italian version of the Scandinavian model. Over the 1980s, even communist-led regions gradually endorsed a pluralist welfare model shifting from a publicly centred approach to the mixed economy of welfare. As these developments blurred the initial differences between left and centre-left regions, the basic divide which surfaced was once again territorial. To the south of Tuscany and Marche, one could detect interesting signs of institutional diffusion, but overall regional policies remained backward and fragmented.” (Fargion 2009: 136)

This institutional context favoured the consolidation of third sector organizations. As a result, Emilia Romagna testified an effective collaboration between public authorities and the third sector²⁴. The Italian political context reinforced the participation of the Catholic third sector, when the fall of the Christian Democracy party at the beginning of the 1990s deprived the Church of a political backing, but this sense of disorientation was to be in part compensated by the consolidation of volunteer activities and involvement in social economy, which gave a new legitimacy to the public presence of the Church (Garelli 2011: 84) (Donovan 2003: 11-113).

The current economic crisis reinforced the interactions with the local authorities. If, generally speaking, Caritas Forlì estimated that they were doing more “substitution” than “subsidiarity”, they however acknowledged that the relations between public authorities and the Catholic third sector were relatively well regulated in their territory²⁵. This collaboration has to be located within a historical context, given that Forlì had been, with Brescia, one of the main cradles of social cooperatives in Italy (Marzocchi 2012). As a result, over the last 20 years, the centre-left municipality of Forlì implemented a governance model of the new needs in matters of personal

²³ Personal interview, Diocesan delegate for Caritas, Bilbao, 19 June 2013. Translated from Spanish

²⁴ Emilia Romagna would provide an intermediary model between Lombardy, where most of the social services have been delegated to third sector organizations, and the Tuscan model where public intervention would be more centralized.

²⁵ The role of mediation of the bishop as being “the only one able to bring together to the table all the authorities of the town” (interview Caritas) was mentioned as well.

services where most of the social services were implemented through third sector organizations. Some services, particularly concerning disability, childhood protection, minors, were entirely delivered through associations or cooperatives, while in traditional services (as for elderly people), the direct presence of public services would be a more consistent one. Caritas became an essential partner for the local authority concerning structural poverty but also exceptional situations, like the North Africa emergency in 2011, the cold weather emergency or the Emilian earthquake in 2012.

In such a context, subsidiarity did not mean confusion: the role of public authorities consisted also in guaranteeing the quality and the efficiency of the services, which induced a dimension of control. This was especially true when dealing with third sector organizations based on voluntarism, themselves often precarious, with the risk of not complying with legal requirements. As a whole, however, this welfare mix model appeared to be well adapted to the Catholic approach, whereas organizations related to the lay-socialist tradition would rather campaign in favour of the direct management of services by public bodies. Significantly, social cooperatives from CSS Forlì participated actively in Welfare Italia, a national project of delivery of health services as a substitute for the decline in public intervention, promoted by the Gino Mattarelli Consortium²⁶, a network of social cooperatives affiliated to Confcooperative.

Relations between Catholic organizations and public authorities also varied according to the sector of intervention and to the degree of dependence on public subsidies. Those Catholic organizations most immersed in markets, like the Bultz-lan consulting in Bilbao, aimed at generating their own growth - “we live by our work” (interview) – thus preventing Caritas, although being the owner of the company, from having to pay for it. This desire for independence did not prevent Caritas and other Catholic bodies from having agreements with public bodies. In 2012, the resources of Caritas Bizkaia came from fundraising campaigns (8,77%), from Caritas’ own resources (58,53%), and from the provision of services to the public administrations (32,69%) (Cáritas Bizkaia 2013). On both territories, the Catholic third sector needed to strike a balance between self-sufficiency and the quest for resources. If, in the case of Caritas Bilbao, the crisis entailed an increase in donations and volunteering, others fell into precariousness because of the decline of public funding. The crisis legitimized the discourse of the third sector while weakening its resources.

3.2. “*Anuncia y denuncia*”: Catholic advocacy

Establishing consolidated partnerships with public authorities did not prevent Catholic organizations from engaging in advocacy, in a more prophetic orientation, either along with other social movements or on their own.

Acting with other social movements constituted a step forward in the removal from the traditional charity-based and depoliticized attitude of the Church. In Forlì, Caritas integrated issue network coalitions on migrants’ rights. In particular, the *Ius Soli* campaign asked for access to citizenship for the migrants’ children who were born in Italy. Another significant campaign concerned the North Africa emergency in 2011, corresponding to the massive arrival of African

²⁶ Gino Mattarelli (1921-1986) was a Christian Democrat politician from Forlì who played a pioneer role in promoting the social cooperatives model in Italy.

refugees after the war in Libya and the Arab spring. The public administration oriented these refugees towards the request of political asylum, but most of them didn't comply with the legal requirements. Caritas, together with other organizations, campaigned in order to obtain residence and work permits, which were obtained through a regularization process completed only in March 2013.

In Bilbao, Caritas, the Jesuit Ellacuria Centre, and the Diocesan Missions were mobilized regularly as being part of the Basque coordination of NGO *Harresiak apurtuz* set up in 1997 in favour of migrants' rights. In 2013, *Harresiak apurtuz* campaigned in favour of the right to public health service for the migrants living in Euskadi²⁷. *Harresiak apurtuz* asked the Ellacuria centre to lead the campaign in order to convince the conservative Catholics' "silent majority", deemed as having an ambivalent attitude towards migrants. Caritas and many Catholic organizations also took part in the national campaign asking for a popular legislative initiative against house expulsions. Caritas Bilbao also integrated the permanent platform in favour of homeless people.

Catholic social organizations also conducted campaigns on their own, by putting forward their religious identity. In Bilbao, a group of Catholic social organizations from Biscaye²⁸ decided in 2011 to coordinate in order to address better the social needs and to articulate new partnerships with the secular third sector and with public administrations (Moreno 2012). One year later, the collective – 23 organizations had met on 23 June 2011 - defined itself as testifying a serving and committed Church, promoting community and volunteering, with a participatory and transparent organizational culture. On 11 June 2012, the collective issued a Manifesto, signed by 21 Catholic organizations. The diagnosis of the crisis insisted on three aspects²⁹: 1) attachment to the European model of welfare state and to the responsibility of the public administration; 2) concerns in front of the recent policy shift that weakened the vulnerable populations (in the Basque Country, the reform of the requirements for the Minimum income benefit and the changes in the requirements for special aids for social inclusion, and, at the Spanish level, the labour market reform and the *Decreto Ley* 16/2012 that eliminated the right to health assistance for foreigners without legal permit of residence); 3) a growing social imaginary, relayed by media and by political discourses, that tended to make guilty the disadvantaged people³⁰. Four proposals were expressed: 1) a need to assume a proactive attitude in order to defend the social model against the restrictions of the system and the increasing individualism; 2) a reaffirmation of the Church organizations' personal, community-based and institutional commitment for the benefit of the most vulnerable; 3) public administrations have to guarantee the rights and the fair redistribution of goods on behalf of the most vulnerable; 4) every member of the society has to assume the responsibility of "living simply so that others can simply live". Equally, the Ellacuria Centre went public as a Jesuit organization in campaigns calling for religious freedom and religious minorities' rights³¹. The inclusion of Catholic organizations within wider issue-based

²⁷ "Piden la eliminación de las restricciones sanitarias a los inmigrantes", *Noticias de Gipuzkoa*, 26 June 2013.

²⁸ Caritas diocesana, Fundación EDE, Fundación Gizakia, Fundación Lagungo, Asociación Bidesari.

²⁹ *Bizkaiko elizaren gizarte erakundeen manifestua*, Bilbao, 21 June 2012.

³⁰ The same phenomena was to be found in Forlì in 2012, when a group of parishioners accused Caritas to have "attracted" delinquents who committed a burglary ("Santa Maria del Fiore. Caritas: 'Povertà non significa delinquenza'", *Corriere della Romagna*, 19 March 2013).

³¹ These campaigns concerned respectively the Basque Parliament concerning the regional law on cults, and the Municipality of Bilbao's urban planning concerning places of worship. The Ellacuria centre also joined the Spanish

coalitions did not prevent them to campaign *as* religious organizations by proposing transversal readings of the crisis.

3.3. Catholic expertise and policy outcomes

The Catholic advocacy had contrasted outcomes. First, the Catholic organizations were recognized by local authorities for their expertise. Along with their obvious knowledge on religious matters, this expertise was acknowledged on poverty and social exclusion, immigration and international cooperation. Caritas was perceived as a data provider and as a social whistleblower. This recognition did not prevent from a division of labour: in Forlì, the municipality referred closely to the annual report of Caritas on poverty and resources, while complementing it with other sources and with public statistics. Caritas was recognized as an expert on social exclusion, which was only *one* of the social matters the Municipality had to deal with. This mutual acknowledgment implied the participation of third sector organizations to different forums generated by the public administration, and notably to the provincial planning of welfare policies. In the Basque Country, Catholic expertise was required as well at the municipal, provincial and regional levels.

The policy influence of the Catholic organizations could go far beyond their single function as data providers. Catholic organizations put forward legislative proposals with expected institutional outcomes. This was particularly visible in the Basque region. As a positive result of the political work led by Caritas along with other organizations, a bill proposal was approved by the Basque Parliament in 2007 – before the crisis - forcing public administrations to include a social clause in public tenders, in order to give an advantage to the social businesses and social cooperatives. Equally, the *Harresiak apurtuz* campaign in favour of migrants' health rights had a positive outcome, when the Basque government, led first by a Socialist majority (2009-2012) then by the PNV (Basque nationalist) (2012-) decided against the injunctions from the Spanish Ministry of Health, to maintain a universal health care system in the Basque Country³².

In some cases, the Catholic expertise and campaigning had an effective impact on regional policy-making, but on a policy-sector which was regarded as a relatively secondary one. Alboan, as part of the Basque Council for Development Cooperation, played for instance an important role in the design of the 2007 Basque law on development cooperation³³. Other campaigns ended with negative outcomes, as for changes in the minimum income in Euskadi. Equally, in 2013 the national campaign asking for a popular initiative law against house expulsions failed due to the opposition of the Popular Party³⁴. Even the failed campaigns, however, provided an occasion to voice claims and to disseminate data among social and political milieus lacking basic knowledge on social exclusion.

campaign led by the Jesuit Service for Migration and the Jesuit NGO *Pueblos unidos* asking for an effective regulation of the internment centres for foreigners.

³² “El Tribunal Constitucional avala la atención sanitaria a los sin papeles”, *El País*, 17 December 2012.

³³ The Jesuits' ability in matters of mediation was also required by the Basque government when the FARC kidnapped Basque citizens in Colombia.

³⁴ In April 2013, supporters of the popular legislative initiative (ILP) on transfer in lieu of payment and the halt to evictions retired the ILP from the Congress of Deputies, given that the Popular party had promoted its own draft law (“Los promotores de la iniciativa popular sobre desahucios la retiran del Congreso”, *El Mundo*, 18 April 2013). The ILP petition had gathered 1,402 854 signatures.

4. Concluding remarks

The comparative attempt outlined in this paper would need to be expanded by having a closer look at the following three items.

The first one concerns the *external proximities* of the Catholic third sector. The “sector of the Catholic third sector” under consideration here proved to be close to secular local and transnational social movements advocating migrants’ rights, alternative economy and resisting anti-austerity policies (Caritas Europa 2013). This proximity confirms previous observations made on the proximity between Catholic activists and the Global justice movement (della Porta and Mosca 2007), peace movements (Tosi and Vitale 2009) or alter-globalists (Purseigle 2005).

It is more than likely that these common criticisms against the drift of neoliberalism would be expanded to a – explicit or implicit - critical assessment of the positions of the Church on ethical and civilizational issues, which raises the issue of the *internal pluralism* of the Church. In Forlì, CSS social cooperatives carefully distinguished themselves from an organization such as *Comunione e Liberazione* (CL) which combines a religious community life embracing the spiritual and emotional, private and professional (Giorgi 2012: 338), with historical links with Christian Democracy. CL would represent a “Catholicization of Neoliberalism” (Muehlebach 2012), as being constituted by “conservative Catholics for whom the rise of the welfare community represents an opportunity to resuscitate a long submerged social project” (*ibid.*: 95)³⁵. The same could be applied in the Basque Country to the discrepancies between most of the above mentioned Catholic social organizations and the more conservative sectors of Spanish Catholicism. The relations with the episcopate need to be scrutinized as well. For their part, the growing dislike in society of the Church giving advice on political or public welfare matters has led prominent ecclesiastics “to fear the reduction of the church to little more than a welfare agency” (Donovan 2003: 113).

A third research direction should deal with the interplay of issues related to social justice and the highly politicized issues of religious pluralism and – especially in the Basque case - peacemaking. In Forlì, the Seventh Day Adventist Church became a regular partner of Catholic associations and cooperatives on delivering welfare projects. Caritas hosted the Romanian Greco-Catholic church, which delivers religious, cultural and social services to the Romanian community. In Forlì as in Bilbao, the Catholic Church let the other Christian denominations and Muslim associations to use Catholic infrastructures for their religious and social activities. In Bilbao, the Ellacuria Centre advocated for interreligious dialogue, religious pluralism and peacemaking. The Escolapios played a major role in structuring the pacifist movement *Gesto por la paz*. These overlaps contributed to blur even further the grey line that separated religious and secular, social and political issues in these two definitively postsecular territories.

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³⁵ Beyond the case of CL and relying on an anthropological fieldwork among voluntary associations in Sesto San Giovanni, Muehlebach concludes that « neoliberalism can exhibit an extraordinary ethical – in this case, Catholic and even Socialist – face. » (2012: 19).

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