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Trade Unions and the Origins of the Union-Based Welfare State in Italy (1950s-1970s)

Stefano Agnoletto

1. A Union-Based Welfare State

During the second half of the twentieth century, Italy, like many other European countries, experienced the birth and growth of a specific kind of welfare state. It was the consequence of various international influences in the context of the Cold War as well as the result of controversial actions of different internal actors. The purpose of this article is to explore the actions of some of these internal actors and their consequences for the definition of the Italian welfare state.

Specifically, the object of this essay is to identify the role played by trade unions in defining the Italian model of state social policy in the period following World War II. This essay proposes an interpretation which identifies trade unions as main actors in the consolidation, albeit difficult and slow, of the welfare system in Italy. Consequently, this enquiry into the “Italian way” also discusses some traditional explanations and classifications proposed in the literature about the welfare state, welfare regimes, and the welfare society. This essay introduces the concept of a “Union Based Welfare State” in order to describe the Italian experience and as a descriptive category useful for comparative analyses generally.

In this framework, this article tries to answer some historiographical questions concerning the “Italian case,” which, from a comparative perspective, are interesting for other national experiences as well. What was the role of the trade union movement in building the welfare system in the second half of the twentieth century? To what political and economic cultures did trade unions refer? What needs did they set out to fulfill? What notions of society did they express? What relationships did they create with the other players (parties, public agencies, enterprises, etc.), and what acknowledgement did they get from them? Which relationships were defined within a pluralistic trade union movement? What was the effective influence of trade unions on the implementation of assistance, social security and health reform? In general, what was the impact of trade union ideas on the model of the welfare state that was built in Italy after World War II? Moreover, can Italian trade unions be considered a pillar of the Italian welfare state and/or welfare community? Finally and more theoretically, does a new evaluation of the role of trade unions change the traditional understanding of the Italian welfare state regime?

This article considers the period from the end of World War II to the 1970s in order to look deeply into the origins of the debate about the welfare system and its practical implementation in the post-Fascist Italian Republic. For the first years of this historical phase, we cannot describe the Italian case as falling within the “universal welfare state” category. In fact, the postwar Italian model of assistance and social security was inherited from the Fascist regime

and may be defined as “corporative and authoritarian.”¹ During the 1950s, the Fascist legacy was translated into a corporate-clientelistic and patriarchal-familist welfare state.²

Although this model was not conspicuously altered during the first fifteen years after the war, this period provided the basis for future choices. In particular, Italian reality was affected by the Beveridge model. Its universal welfare state principles were iterated in the new democratic Constitution issued in 1948, even if they were not practically implemented in new regulations.³ During those years, the question of a new welfare state model was at the heart of the political and cultural debate in which trade union organizations were main actors.

Only in the 1960s and 1970s did the results of this debate become important for regulation. In those decades, the discussion of whether the Italian case fell within the “universal welfare state” category began.⁴ The discussion of this representation’s acceptability is one objective of this paper.

Following this working hypothesis, this article assesses one particular aspect of the complex framework of the Italian trade union experience after World War II. It offers a reconstruction of the debate and actions regarding the welfare state questions that feature the two most important Italian trade unions, the *Confederazione Generale Italiana del Lavoro* (Italian General Council of Labor) (CGIL) and the *Confederazione Italiana Sindacati Lavoratori* (Italian Confederation of Workers’ Unions) (CISL).

Formed in 1906, CGIL is the largest Italian trade union. From the beginning, its history was characterized by a class-oriented culture and organization. Unlike the tradition of English trade-unionism, the centrality of the confederation took precedence over the role of individual federations of trade. Additionally, another original feature of CGIL was its close relationship with the Socialist Party.⁵ After World War II it became a leftist trade union confederation with close links to the Italian Communist Party; but, it also maintained significant autonomy.⁶

Formed in 1950, the trade union organization CISL was the result of the unification between Roman Catholic trade unions, organized in 1948 as the *Libera Confederazione Generale Italiana del Lavoro* (the Free CGIL) (LCGIL), and some minority trade union organizations of the social democratic tradition, in particular the *Federazione Italiana del Lavoro* (Italian Federation of Labor) (FIL), constituted in 1949.⁷ The birth of CISL was also a consequence of the Cold War’s effect on the Italian trade union movement and the defeat of the hypothesis of a united trade unions council with CGIL.⁸ CISL was a unique organization that

1 Gianni Silei, *Welfare State e socialdemocrazia* (Bari and Rome: Piero Lacaita Editore, 2000).

2 Ugo Ascoli, “Il modello storico del Welfare State italiano,” *Cittadinanza. Individui, diritti sociali, collettività nella storia contemporanea*, edited by Carlotta Sorba (Rome: Pubblicazioni degli Archivi di Stato, 1999), 215-224; Chiara Giorgi, *La previdenza del regime. Storia dell’Inps durante il fascismo* (Bologna: Il Mulino, 2009); Silei, *Welfare State e socialdemocrazia*; Francesco Villa, *Lezioni di politica sociale* (Milan: Vita e Pensiero, 2003).

3 Giuseppe Casadio, *I diritti sociali e del lavoro nella Costituzione italiana* (Rome: Ediesse, 2007); Andrea Salini, “L’ordinamento dell’assistenza nei lavori dell’assemblea Costituente,” *Bollettino dell’Archivio per la Storia del Movimento Sociale Cattolico in Italia*, n. 2 (2003): 241-266; Loreto Di Nucci, “Alle origini dello stato sociale nell’Italia repubblicana. La ricezione del piano Beveridge e il dibattito alla Costituente,” in Sorba, *Cittadinanza*; Ascoli, “Il modello storico del Welfare State italiano.”

4 Ascoli, “Il modello storico del Welfare State italiano.”

5 Adolfo Pepe, *Il Sindacato nell’Italia del novecento* (Soveria Mannelli: Rubbettino, 1996).

6 Adolfo Pepe, *Storia del sindacato in Italia nel ’900*, vol. 3, *La CGIL e la costruzione della democrazia* (Rome: Ediesse, 2001); Adolfo Pepe, Pasquale Iuso, and Fabrizio Loreto, *La CGIL e il Novecento italiano. Un secolo di lotte, di passioni, di proposte per i diritti e la dignità del lavoro* (Rome: Ediesse, 2003).

7 Vincenzo Saba and Giampiero Bianchi, ed., *La nascita della CISL, 1948-1951* (Rome: Edizioni Lavoro, 1990).

8 Federico Romero, *Gli Stati Uniti e il Sindacalismo europeo (1945-1951)* (Rome: Edizioni Lavoro, 1989).

synthesized different traditions and cultures, such as Christian social and Christian labor cultures, as well as the various currents of the limited but lively universe of Italian social democracy. It has represented a significant alternative to the class-based tradition of Italian trade unionism.⁹

In the essay, a description of the actions of the *Istituto Nazionale di Assistenza Sociale* (National Institute of Social Assistance) (INAS) and *Istituto Nazionale Confederale di Assistenza* (Confederated National Institute of Assistance) (INCA) also assists in the investigation of CISL and CGIL's roles in the welfare state. INAS and INCA are the *Patronati* (trade union aid societies) of the CISL and CGIL and the tools by which trade unions deal with daily assistance and social security issues. The *Patronato* offers free-of-charge assistance to workers in regards to pensions, industrial accidents, litigation, and so on. This is funded with state resources.

The trade union *Patronato* is an original Italian phenomenon, a peculiar institution wherein the distinction between public and private is poorly defined, its trade union identity overlapping its public utility function.¹⁰ From a broader historical perspective, the *Patronato* is also a symbol of the Italian welfare state model as a whole, which has, since the 1950s, been characterized by intermediate combinations of state intervention, privatization, and a lack of protection.

To summarize, the final goal of this essay is to show how the Italian welfare state experience represents, in the European postwar context, an original "union way" which questions traditional descriptions of the Italian welfare state. In particular, it challenges the description of Italian social policy that uses only the categories of clientelism and familism and instead highlights elements of discontinuity and the central role of trade unions in social policy implementation. Furthermore, this article focuses on a trade unionist approach to welfare state issues that highlight the "pan-syndicalism attitude" that has structurally characterized the Italian case study. In this framework, issues such as gender equality outside the work place and health care reform have also become watchwords of union action.

In order to pursue the topics mentioned above, the second part of the article presents an overview of the Italian social security model immediately following World War II. Part three is then dedicated to exploring the debate that took place in the 1950s between CISL and CGIL about the Italian welfare state. In part four, I analyze the experience of *Patronati* INAS and INCA. Part five looks more deeply into the role played by trade unions, often in connection with other social movements such as the feminist movement, in the practical building of the Italian welfare state during the 1960s and 1970s. Finally, part six concerns characteristics of the Italian union-based pattern of the welfare state and its elements of continuity and discontinuity.

2. *The Fascist Legacy: A corporate-clientelistic and patriarchal-familist welfare state in the 1950s*

Immediately following World War II, the Italian social security system was based on the model that took form under fascism. Clientelistic and corporative management of the system ensured

9 Guido Baglioni, ed., *Analisi della CISL. Fatti e giudizi di una esperienza sindacale* (Rome: Edizioni Lavoro, 1980); Guido Baglioni, *La lunga marcia della CISL, 1950-2010* (Bologna: Il Mulino, 2011); Mario Romani, *Appunti sull'evoluzione del sindacato* (Milan: Capello e Boati, 1951); Vincenzo Saba, *Il problema storico della CISL* (Rome: Edizioni Lavoro, 2000); Sergio Zaninelli, *Il Risorgimento sindacale in Italia. Scritti e discorsi 1951-75* (Milan: Franco Angeli, 1988).

10 Vincenzo Saba, "I caratteri originari della CISL in materia di Welfare State" *Oggi domani anziani*, n. 4 (1992).

the persistent hegemony of an approach in which the welfare state was, above all, a functional tool for political purposes such as social control and the creation of consensus. The result was a fragmented and dualistic system based on authoritarian inspiration and a deeply patriarchal and paternalistic culture. Moreover, it drew upon the dominant functionalist ideology of the family, and state services were complementary to a rigid gender division of labor in society.

The “Fascist Social State” was implemented through two basic steps.¹¹ The first step was to destroy with urgency the structures managed by ideological competitors. To this end, pre-existing structures managed by trade unions and workers’ movements were dismantled, beginning in 1923 with the suppression of the pre-Fascist Ministry of Labor and Social Security.¹² In fact, the *Federazione delle Società di Mutuo Soccorso* (Federation of Mutual Aid Societies) and the *casse autonome* (credit and deposit institutions), directly managed by workers’ associations, were dissolved during the first years of the Fascist regime.¹³ At the same time, the signing of the 1929 Lateran Treaty between Mussolini and representatives of the Pope, showed an ideological alliance between the Fascist regime and Church; this permitted many Catholic activities to continue to exist during the dictatorship and did not curb their sphere of influence.¹⁴

The second step was the foundation of the Corporatist state when the regime began implementing Fascist social policy, especially after 1927. There was a great increase in welfare programs during the 1930s and early 1940s, such as a plan for family allowances in 1933/1934 and compulsory sickness insurance in 1943.¹⁵ This was quantitatively expressed in the regime’s social expenditure, which grew to some 15-17 percent of the state budget, two to three times more than in 1922.¹⁶ The supporting structure of the Fascist model of the “Social State” included state social security and assistance institutions such as: the *Opera Nazionale per la Maternità e l’Infanzia* (National Organization for Motherhood and Childhood) (ONMI), constituted in 1925; the *Istituto Nazionale Fascista della Previdenza Sociale* (Fascist National Institute of Social Security) (INFPS), constituted in 1933; the *Istituto Nazionale Fascista per l’Assicurazione contro gli Infortuni sul Lavoro* (Fascist National Institute for Insurance against Industrial Accidents) (INFAIL), constituted in 1933; and the *Istituto Nazionale per l’Assicurazione contro le Malattie* (Disease Support Workers National Institute) (INAM), constituted in 1943.¹⁷

All these achievements resulted from a political perspective in which social policy was a very important ideological tool in the creation and maintenance of social control.¹⁸ As Ferrera has noted, the large insurance agencies (INFPS, INFAIL and INAM) became an “arena of clientelistic exchanges through the provision of selective benefits to social clients whose consensus had to be secured and preserved.”¹⁹ Although the regime’s leadership always highlighted the achievements of Fascist social policy, the real effect of the dictatorship’s welfare

11 This term deserves deep critical semantic and historical reflection. Borrowing it from Gianni Silei’s book, I want to emphasize the need for caution when using it.

12 Gianni Silei, *Welfare State e socialdemocrazia*, 95-96.

13 Gianni Silei, *Welfare State e socialdemocrazia*, 95-96.

14 Arturo Carlo Jemolo, *Chiesa e Stato in Italia negli ultimi cento anni* (Turin: Einaudi, 1948).

15 Maurizio Ferrara, “Italy,” *Growth to Limits, the Welfare European Welfare States Since World War Two*, edited by Peter Flora (Berlin: Walter de Gruyter, 1986), 389.

16 Peter Flora, ed., *Growth to Limits, the Welfare European Welfare States Since World War Two* (Berlin: Walter de Gruyter, 1986).

17 Gianni Silei, *Welfare State e socialdemocrazia*; Giorgi, *La previdenza del regime*.

18 Renzo De Felice, *Mussolini il Fascista* (Turin: Einaudi, 1968); Renzo De Felice, *Mussolini il Duce* (Turin: Einaudi, 1974).

19 Ferrara, “Italy,” 389.

state was a pattern of episodic, fragmentary, and discriminatory protection.²⁰ The reality was that unemployment insurance was at the level of starvation wages and workers gained access to a clearly inadequate health care system. Moreover, access to these inadequate services was based on political and social discrimination. For instance, following the 1929 crisis, aid to the unemployed went to those “with the right politics.”²¹

The Italian welfare state pattern described above did not change significantly during the first two decades after World War II.²² A sort of long-term path dependency attitude limited the capacity for reform. The characteristics of this system may be summarized as follows:

- the division of the assistance and social security system into specific categories based on the subjects in need of assistance (a universal assistance and social security system for all citizens did not exist);
- the constitution of agencies structured on categories of subjects following the Fascist pattern and an increased number of agencies granting services;
- a lack of planning and coordination between different agencies and activities;
- enormous gaps in assistance (for instance, to the elderly);
- an excess of bureaucracy and discretionary power;
- the principle that state assistance, to which individuals were entitled by law, was only subsidiary to institutional assistance.²³

The institutional framework inherited from Fascism divided social security into three separate parts: social insurance, health care, assistance.²⁴ In particular, the social insurance agencies created under fascism, along with a plethora of smaller institutions that were added over the years, covered six main types of needs: pensions, sickness and maternity, accidents and occupational diseases, unemployment, tuberculosis, and family allowances.²⁵ The coverage provided by insurance agencies was limited to employees while the self-employed were excluded. Moreover, most benefits were flat-rate or tied to previous contributions.²⁶ Private actors basically ran the health care system which was also altered by a system of professional or private “Casse Mutue” (Insurance Funds).²⁷ Finally, assistance was provided by many different public agencies, such as the *Enti Comunali di Assistenza* (municipal assistance agencies) (ECA), founded under fascism in 1936, that worked at the local level side by side private and Church charities.

It should be noted that this assistance system model was inconsistent with the principles expressed in the new Constitution of the Italian democratic state, passed in 1948 after the lengthy debate of the Constituent Assembly (1946–1948).²⁸ In particular, the new Constitution, and specifically article 38, introduced the state’s responsibility for assistance and envisaged the

20 Maria Sophia Quine, *Italy's Social Revolution: Charity and Welfare from Liberalism to Fascism* (New York: Palgrave Macmillan, 2002).

21 Levy, 2004; Quine, *Italy's Social Revolution*.

22 Villa, *Lezioni di politica sociale*, 54.

23 Silei, *Welfare State e socialdemocrazia*; Giorgi, *La previdenza del regime*.

24 Ferrara, “Italy,” 390.

25 Gianni Silei, *Lo Stato sociale in Italia. Storia e documenti*, 2 vols. (Manduria, Bari and Rome: Piero Lacaita Editore, 2004).

26 Ferrara, “Italy,” 390.

27 Silei, *Lo Stato sociale in Italia*.

28 Casadio, *I diritti sociali e del lavoro nella Costituzione italiana*; Salini, “L’ordinamento dell’assistenza nei lavori dell’assemblea Costituente”; Di Nucci, “Alle origini dello stato sociale nell’Italia repubblicana.”

“liberation from need” for all citizens. During the 1950s and the early 1960s, however, the main features of the assistance and social security system were not altered, nor were the constitutional principles seriously implemented, notwithstanding their lively discussion. For instance, while the new Constitution was under discussion, a “Committee for the Reformation of Social Security” was created at the Ministry of Labor and was chaired by the socialist reformer Ludovico D’Aragona. The final document of this Committee foretold a reformation of the social security system that conceived of a universal welfare state built through the extension of social insurances to all workers and the merger of various state agencies created during the Fascist era. These changes, however, were never implemented.²⁹

In general, continuity with Fascist state policy was reflected in high institutional and organizational fragmentation, the extreme difference in performance based on various employment schemes, as well as the widespread presence of private agencies.³⁰ Moreover, assistance was not yet one of the main goals of the state. As under fascism, the welfare state still served other objectives such as social control and the creation of consensus. Social control and the creation of consensus worked through an apparently paradoxical system that was neither market-oriented nor universalist, but based on four controversial pillars: particularism, dualism, familism, and clientelism.³¹

In general, social benefits differed greatly depending on the specific “status” the individual had acquired through their participation in the labor market. The result was an exasperating particularism with hundreds of different situations that made for horizontal conflicts rather than vertical or class-related ones. Clientelism was a natural consequence of power imbalances among millions of individual relationships, rather than between the collective and state agencies, such as INPS, INAM, or INAIL. Moreover, society was also divided between people inside and people outside the protective network provided by state agencies. Social rights were not recognized because of citizenship, but as a consequence of the individual’s specific status in society.

Finally, the Italian welfare state was based on a deeply patriarchal and paternalistic culture.³² This particularistic, clientelistic, and dualistic nature of the system was supported by an ideological and functionalist vision of the family, which idealized a division of roles according to gender and allocated childcare to women. This approach was a consequence of the traditional “Catholic” idea of woman as “sanctified” in her role as devoted mother. Consequently, she should not think about entering the labor market, which would impair the performance of her “natural” duties.

During the 1950s, the main features of this assistance and social security system were not altered and constitutional principles were not seriously implemented. Among the most significant reformation interventions was the progressive enlargement of assistance and insurance schemes to include new categories of workers. In 1952, for example, insurance for disabilities and old age was extended to farmers and craftsmen. Another change was the creation of new central agencies such as the Ministry of Health (1958), which favored the principle of the “right to health.”

The lack of a general reformation of the assistance and social security system, along with the failure to move toward a universal pattern of the welfare state, gave rise to a great deal of debate. The work of the *Commissione Parlamentare di Inchiesta sulla Miseria in Italia e sui*

29 Silei, *Welfare State e socialdemocrazia*, 99; Committee for Social Security Reformation (CRPS), *Rapporto sui lavori della Commissione* (Rome: Ministry of Labor and Welfare, 1948).

30 Fiorenzo Girotti, *Welfare state. Storia, modelli e critica* (Rome: Carocci, 1998), 279.

31 Ascoli, “Il modello storico del Welfare State italiano.”

32 Ascoli, “Il modello storico del Welfare State italiano.”

Mezzi per Combatterla (Parliamentary Commission on Poverty in Italy and the Means to Combat It) in the early 1950s marked an important intervention. In particular, the acts of this committee included Giuliano Mazzoni's 1953 report on assistance regulations.³³ Mazzoni indicated that the "right to assistance" was a fundamental right already present in the Italian Constitution. He specifically identified three interconnected articles of the Constitution.³⁴ Article 4 establishes the right to work and "promotes the conditions implementing this right," article 32 establishes the right to health with "free of charge medical treatment to the poor," and article 38 establishes the right to financial support and social assistance for "every citizen unable to work and bereft of the necessary means to live."³⁵

Mazzoni emphasized the difficulty of reforming the assistance system in respect to the principles listed in the Constitution. These difficulties were outlined as follows:

- the fragmentary nature of the regulations;
- the lack of an overall vision of the poverty issues;
- the plurality of assistance bodies and agencies;
- the lack of a rational assistance action and effective coordination;
- the lack of legal support for situations producing poverty for which private support appeared to be inadequate.³⁶

3. Italian Trade Unions and the Idea of a Universal Welfare State: The debate in the 1950s

As the acts of Mazzoni's Parliamentary Commission show, the years immediately following the end of World War II saw the emergence of a lively debate on the corporate-clientelistic and patriarchal-familist system, despite the absence of significant changes. Trade unions were the protagonists of this discussion and their actions would characterize the entire history of the Italian welfare state in the postwar period.

After the Fascist regime was defeated, the main traditions of Italian trade unionism were absorbed into CGIL. In the context of the Cold War, however, unitary CGIL was short lived.³⁷ In 1948, the Christian wing left the unitary trade union and gave rise to LCGIL, the "Free GCIL." In June 1949, the republican and social democratic wings also left the unitary CGIL and constituted the *Federazione Italiana del Lavoro* (Italian Federation of Labor) (FIL). In Rome on May 1, 1950, CISL was constituted from LCGIL and the greater part of FIL and the trade unions that were members of the *Unione federazioni autonome italiane lavoratori* (Federated Autonomous Union of Italian Workers) (UFAIL).³⁸ From this moment onwards, CGIL and CISL represented the two major trade union confederations in the Italian pluralistic model.³⁹

33 Giuliano Mazzoni, *La legislazione assistenziale vigente*. In *Atti della Commissione Parlamentare di inchiesta sulla miseria in Italia e sui mezzi per combatterla*, vol. III, *Indagini tecniche, Legislazione assistenziale*, edited by Chamber of the Deputies (Rome, 1953).

34 Mazzoni, *La legislazione assistenziale vigente*, 14.

35 Translation by the author.

36 Mazzoni, *La legislazione assistenziale vigente*, 28-29.

37 Aris Accornero, ed., "Problemi e questioni del movimento sindacale (1943-1973)," *Annali della Fondazione Giangiacomo Feltrinelli*, XVI (Milan: Feltrinelli, 1976).

38 Vincenzo Saba and Giampiero Bianchi, eds., *La nascita della CISL, 1948-1951* (Rome: Edizioni Lavoro, 1990).

39 The pluralistic Italian model has seen the presence of many other minor trade unions of which the most important are the social democratic UIL and the right-wing CISNAL (now UGL).

During the 1950s, the fundamental role of trade unions in building an Italian pattern of the universal welfare state became apparent.⁴⁰ Italian trade unions became protagonists in this fight even if they formally represented *a part* (the *class* in the Communist CGIL, or the *members of the trade unions* in the moderate CISL) of Italian society. The role that trade unions played in the postwar era represented the most important discontinuity with the Fascist era. It represented the practical conflict between social policy as a tool for social control and social pacification and the welfare state as a means for more social justice.⁴¹ Moreover, the trade unionist approach to welfare state issues highlights the “pan-syndicalism attitude” that has structurally characterized the Italian case. This attitude, a consequence of the confederate organization that has historically characterized the Italian trade unions, made them profoundly different from those of the Anglo-Saxon tradition.⁴²

The large body of literature on Italian trade union history has described the peculiarities of this experience and has also highlighted the differences between CGIL and CISL, even if they have both operated in the same “confederate” framework. In particular, literature on CISL has focused on three central ideas about its historical experience: the autonomy of trade unions from the political system, their associative pattern of organization, and the importance of bargaining as the main instrument of action to protect workers.⁴³ In contrast, the literature on CGIL has focused on its particular combination of classist ideology and reformist action, which translates into a territorially based pattern of organization and the use of conflicting actions and commitment to fight for legislative innovation.⁴⁴ Despite their differences, CISL and CGIL both became protagonists in shaping the Italian welfare state. In fact, the two Confederations have taken part in an open debate regarding the need for social policy reform since the 1950s.

Since its origins, CISL has been particularly sensitive to the issues of the welfare state, with an initially labor-oriented notion of the right to assistance and social security that subsequently became universal. The paternalistic and charitable formula, traditionally prevalent in Italian Catholic culture, was immediately overcome. CISL provided a setting wherein cultures which may be defined as “Christian social” and “social democratic” could interface and develop strong reformation hypotheses. CISL’s statute conceived of the right to assistance and social security as among a worker’s fundamental rights; this mission steadily expanded to ensure the fulfillment of the needs of workers and their families.

In June 1950, the first session of the CISL General Committee emphasized the reformation of the social security system as a main objective.⁴⁵ It is interesting to note, however, that the first years of CISL did not feature discussions on proposals for an organic platform of reforms. As far as social security was concerned, CISL action focused on social security protection for workers within the existing institutional framework. At the 1952 symposium, *La corresponsabilità dei lavoratori negli istituti mutualistici di assistenza e previdenza* (The co-

40 Stefano Agnoletto, *Ci chiamavano gli avvocati dei poveri. Storia dell’INAS, il patronato della CISL* (Rome: Edizioni Lavoro, 2000).

41 Ignazio Masulli, “Cittadinanza e stato sociale in Italia: azione sindacale e politiche governative negli anni Sessanta e Settanta,” Sorba, *Cittadinanza* (Rome: Pubblicazioni Degli Archivi Di Stato, 1999), 189-214.

42 Pepe, *Il Sindacato nell’Italia del novecento*.

43 Baglioni, *Analisi della CISL*; Baglioni, *La lunga marcia della CISL*; Romani, *Appunti sull’evoluzione del sindacato*; Saba, *Il problema storico della CISL*; Zaninelli, 1981.

44 Fabrizio Loreto, *Storia della CGIL. Dalle origini ad oggi* (Rome: Ediesse, 2009); Pepe, *Il Sindacato nell’Italia del novecento*; Pepe, Iuso, and Loreto, *La CGIL e il Novecento italiano*; Adolfo Pepe, Pasquale Iuso, and Simone Misiani, *La CGIL e la costruzione della democrazia* (Rome: Ediesse, 2001).

45 Stefano Agnoletto, “La CISL e lo stato sociale nei documenti della Confederazione (1950-1960),” *Fisba Documentazione IV*, no.1/2 (1995), 12.

responsibility of workers in Health and Social Security Institutes), CISL Secretary General Giulio Pastore stated that the discussion centered on improving trade union participation in assistance and social security agency management.⁴⁶ CISL still did not breach the topic of a structural lack of public social protection. Instead, it focused on bettering social assistance within existing system inherited from the Fascist era.

A different approach emerged during the following years. In April 1955, the Council Secretariat's report from the second National Congress of CISL placed greater emphasis on a general reform of the welfare system. This provided a new alternative between two conflicting positions: either complete state responsibility for social security for all citizens funded by the tax system, or a mixed participation system comprising of state intervention and an insurance system based upon the autonomous contributions of workers.⁴⁷

On May 9 and 10, 1957, CISL convened a symposium in Rome on social security issues that ended with Giulio Pastore's speech, tellingly titled "*Prospettive di un Piano per la Sicurezza Sociale*" (Perspective of a Social Security Plan). Pastore identified the two main principles of the political line CISL would take: overcoming the insurance principle in favor of a universal social security system and linking social security policy to a coordinated economic development policy.⁴⁸

Following the 1957 symposium, the CISL Study Department was entrusted with the creation of a report later published in issue 9 of *Quaderni di studi e documentazione* (*Journal of Study and Documentation*) in 1958.⁴⁹ This study was introduced as the first organic attempt to reform social security in a way that would implement a real social security system in Italy. The proposal was that social security and assistance service responsibility were to be undertaken by the state, and it recognized the standard of performance to which citizens as such have a right. This represents CISL's arrival at a universal and public notion of the welfare state, the features of which may be described as follows:

- the shift from a social protection system of an insurance kind, based on a "risk principle," to a system based on a "need protection principle";
- the receivers are the citizens as such and not only the workers;
- the funding for the social security system should only come from the general tax system;
- the funding of this new system of social protection should be modeled on citizen's contribution capacity, turning to progressive specific taxes based on income classes.

The 1958 study proposed an interesting synthesis that may be called a "CISL vision" of the roles of the state and trade unions. A political culture emerged which tried to become a meaningful alternative to both the state vision and the private formulation of social relationships. Interestingly, in Italy it was a trade union organization that supported this vision. An actor such as CISL set itself up as capable of autonomous elaborations and not only as simple trade union supporting political party organizations (above all the Christian Democrats).

The 1958 CISL document states the following:

46 Giulio Pastore, "Prospettive di un piano per la sicurezza sociale," *Dalla previdenza alla sicurezza sociale*, edited by CISL Study Department, monograph issue of *Quaderni di studi e documentazione*, no.7 (1957), 180-181.

47 CISL, *Relazione della Segreteria Confederale. 2° Congresso Nazionale* (Rome: CISL, 1955), 214-222.

48 Pastore, "Prospettive di un piano per la sicurezza sociale," 184.

49 CISL Study Department, "La sicurezza sociale e il sindacato," *Quaderni di studi e documentazione*, no. 9 (1958).

The prevailing trade union movement trend, of which CISL was a promoter and at the forefront, is to urge the state more and more to face its increasing responsibilities towards the citizen as such and to charge the public powers with the task of representing and expressing the citizens' interests as such. At the same time, the trend is to entrust the trade union, and all its ways of being (among which collective bargaining stands out) with the exclusive task of representing the citizen in his professional standing and his free and private display of interests (...) The increase of state obligations towards the collectivity and society on the whole does not imply the decrease of opportunities belonging to the interest groups and to the collective-private action (...) When the state has taken upon itself the task of ensuring some forms and some minimum levels of security, it must not be absolutely excluded. On the contrary, it must be considered necessary that private subjects, and particularly workers, continue to freely and willingly seek those higher forms and levels of insurance against the risk of social life considered fit to ones' well-being and civil and moral progress.⁵⁰

The notion of a "pluralist society" was outlined, ensuring the fundamental rights of all citizens through state action, without leaving them in the hands of market forces but without denying the action of other subjects. The same document from 1957 emphasizes the key role of the contractual solution as a pivot for social action. It also affirmed that the state must not erase the trade unions' function or negate their bargaining position in the social security and assistance fields:

The contractual dynamism of which CISL has long been a promoter in Italy (...) also develops itself towards the extension of the subject matter of bargaining. Social security and collective assistance against a great part of the risks of modern social life, strictly interconnected with kinds of services and their extension granted to the citizens of the state, cannot but become an integral part of the working relationship. That is why the bargaining policy aim of an efficient trade union shall also be the introduction of provisions and systems concerning the various forms of social insurances in all contracts, at any level upon which they are agreed.⁵¹

The statements contained in the 1958 official document of the CISL Study Department resurfaced in the discussion of CISL's Executive Committee, convened in Pegli on January 21 and 22, 1958. On this occasion a resolution was made "*per un programma di attuazione del piano di sicurezza sociale*" (for a social security implementation plan) based on two fundamental assumptions: the need to link the social security policy to economic development policy and the

50 Translation by the author.

51 Translation by the author.

need to overcome the insurance principle in favor of citizens' rights as such.⁵² The document identified some practical proposals for a new universal welfare state model for Italy:

- funding the system with insurance payments and universal taxes;
- generalization of protection for all citizens;
- national health service for any kind of illness;
- national service for pensions and financial support;
- national service for social care for any citizen in need.

In the *Risoluzione su problemi attuali della sicurezza sociale* (Resolution on Current Social Security Issues), approved by the CISL's Executive Committee on May 6, 1960, the positions already expressed were repeated and two general proposals were put forward: the generalization of health services for all citizens through the creation of a national health service, and the introduction of a minimum pension, funded by the tax system, for all citizens.⁵³

With this document, CISL's elaboration of assistance and social security came to an end. Working in a chaotic legal framework and a political context blocked by the ideological conflicts of the "Cold War," it is particularly interesting to focus on CISL's approach to key strategic issues of the welfare state. CISL became the place where radical reform ideas were put forward, giving voice to political and social cultures, Christian Social and Social Democratic, seemingly weak and isolated in Italy immediately after World War II.

Such radical reform hypotheses were based upon certain general ideas. First of all, CISL's actions were founded on the trade union traditions of collective bargaining and the principles of equity and solidarity. At the same time, CISL had a key role in the development of policy for the Italian system as a whole. In this perspective, the trade unions' autonomous and essential role in a modern, democratic, and pluralistic society was combined with the proclaimed existence of certain "citizenship rights," ensuring what should be a fundamental task belonging to the modern democratic state alone.

Interestingly, CISL proposals from the 1950s put together the principle of a universal welfare state together with collective bargaining practices. This original combination of a social policy based on the strong role of the state but in a pluralist society featuring the powerful presence of the trade unions became the reality of 1970s Italy (see section 5).

The CISL attitude toward welfare issues was combined with ideas and proposals of CGIL. With its socialist-communist inspiration, CGIL also continually offered proposals and criticisms for the assistance and social security system immediately after World War II and proved autonomous and capable of offering meaningful commentary on these issues. These actions challenge the historical interpretation of CGIL as a simple tool of the Communist Party.⁵⁴ In particular, CGIL position on the welfare state allowed for the coexistence of both a universalist approach and a laborist position.

52 CISL Executive Committee, "Risoluzione del Comitato Esecutivo della CISL per un programma di attuazione del piano di sicurezza sociale," edited by CISL Executive Committee convened in Pegli on January 21-22, 1958, annexed to *La sicurezza sociale e il sindacato*, edited by CISL Study Department, in *Quaderni di studi e documentazione*, no. 9 (1958), 155-162.

53 CISL Executive Committee, "Risoluzione sui problemi attuali della sicurezza sociale," edited by CISL Executive Committee convened in Rome, on May 6-7, 1960, in CISL, *Documenti ufficiali dal 1959 al 1961* (Rome: CISL, 1962), 169-171.

54 Marco Ravaglia, *Il sindacato e l'autonomia dai partiti* (Rome: Ediesse, 2009).

As for CISL, it is possible to list some important milestones in CGIL's welfare initiatives in postwar Italy. In 1947, the first Congress of Unitary CGIL called for the unification of social insurance institutions and their democratic government, as stated in the document of the communist faction:

We support social security reform which unifies and democratizes social security institutions under the direction of a leadership chosen by the insured and which guarantees adequate benefits and pensions to all workers.⁵⁵

In 1950, CGIL proposed the "Piano del Lavoro" (Plan for Employment), at the "Conferenza Economica Nazionale" (National Conference on Economy) held in Rome in February.⁵⁶ The final document of this conference emphasizes the need for a plan involving "Keynesian investments," such as public investments in industry and public housing, in order to strengthen the Italian economy after the war by supporting aggregate demand. The "Piano del Lavoro" describes the cultural approach that inspired the CGIL at this juncture. Despite its ideological aversion to the capitalistic system, the trade union was able to propose a strategy for economic policy that foreshadowed a general improvement of living conditions of workers, without questioning the foundations of a market society. In the same framework, the CGIL carried out its proposal pertaining to the welfare state. That same year, CGIL leader Giuseppe Di Vittorio highlighted the urgency of pension reform based on the constitutional principles of universal protection for all citizens in the journal *L'Assistenza Sociale*:

We must continue agitation in the country to adopt the pension reform, that should be liable to meet at least the minimum needs of our elderly, disabled, job injured, etc., and that should be extended to all needy men and women according to the principles established by the Constitution.⁵⁷

Two years later in 1952, at the National Conference of INCA-CGIL (see Section 4) held in Naples on October 23-25, the final document highlighted the most significant weaknesses of the Italian pension system:

- the exclusion of many categories of workers from the social security system;
- discrimination based on gender, economic sector, and professional qualifications;
- the lack of a mechanism to adjust pensions according to inflation.⁵⁸

In general, this document stated that the system was inspired by private law and insurance principles which did not meet the provisions of the Constitution, in particular article 38.

⁵⁵ *L'Assistenza Sociale* (May 1947): 1. Translation by the author.

⁵⁶ Giovanni Bonifati and Fernando Vianello, "L'economia italiana al tempo del Piano del lavoro," *Il Piano del Lavoro della CGIL 1949-1950* (Milan: Feltrinelli, 1978): 88.

⁵⁷ *L'Assistenza Sociale* (1950): 1-2. Translation by the author.

⁵⁸ *Documento conclusivo*, "Documento conclusivo III convegno nazionale INCA," *L'Assistenza Sociale*, n. 11-12 (November-December): 63.

During the “National Conference on Occupational Accidents” that took place in Milan on November 8 and 9, 1952, CGIL pushed to extend insurance coverage to all workers, attempting to overcome the fragmentation that characterized the protection system inherited from fascism. The path towards a universal system was clearly indicated.⁵⁹

In the following years, CGIL’s approach to issues concerning social policy showed a specific focus on gender-related matters. An important event was the “Conferenza Nazionale della Donna Lavoratrice” (National Conference of Women Workers), held in Florence on January 23-24, 1954. At the end of the conference, the “Carta dei Diritti della Lavoratrice” (Charter of Rights of the Female Worker) was approved. It included the following points:

- respect for the Constitution;
- right of women to work, the foundation of the right to life;
- right of access to all professions;
- right to equal pay for equal work;
- right for protection of maternity, childcare and health;
- compliance with the law on maternity protection;
- compliance with employment contracts;
- reform of the pension system to ensure all workers (including peasants, artisans, and housewives) assistance and retirement;
- respect for the personality and democratic freedoms of women in the workplace.⁶⁰

The document highlighted CGIL’s universalist and laborist approach to the issues of social rights.

That same year, CGIL leader Di Vittorio supported a proposal to grant financial support to all people over 65 years old and without any pension. This grant was to be funded by the state through general taxation. It represented a clear intervention in support of a universalist welfare state based on the rights of all citizens, both workers and non-workers.

In the following years, CGIL confirmed its universalist approach to welfare state issues. Two important steps in this direction were the CGIL National Council on Social Security Reform in 1959 and the 1960 bill for a structural reform of the social security system of the new CGIL leader Novella.

4. The Trade Union’s Gate to Public Assistance: Patronati in the Fifties

The trade union *Patronati* are a unique aspect of the “Italian case” and are still active today. *Patronati* are agencies where workers can get free advice, assistance, protection, and representation. These structures belong to the trade unions. At the same time, they are funded by state resources because the public utility of their action is recognized. In fact, the state pays the *Patronati* a given amount of money for each assistance file opened in favor of a single worker. The *Patronati* are therefore hybrid subjects, neither state-owned nor private. In addition, through the *Patronati*, trade unions may continually monitor the functioning of the social security system. Thus, the state recognizes that the trade unions play a key role as far as assistance and social

⁵⁹ *L’Assistenza Sociale* (October 1952): 6.

⁶⁰ CGIL, *L’emancipazione delle lavoratrici italiane, atti della Conferenza nazionale della donna lavoratrice (Firenze, 23-24 gennaio 1954)* (Rome: CGIL, 1954).

security are concerned. Through their *Patronati*, trade unions assess cases and litigation concerning workers' social rights daily; at the same time, they denounce, propose, and judge the operating modalities of the Italian welfare state system. The activity of workers' representation and various law suits became critical to the analysis of the assistance and social security system and they affect the evolution of litigation and regulation.

The origins of the *Patronati* in the Italian historical experience can be traced back to the late-nineteenth and early-twentieth century. They were fostered in the context of various mutual aid and unionist associations, arising particularly in Catholic and Socialist settings. Immediately after World War II and the fall of fascism, the reorganization of *Patronati* took place within the wider trade union movement. In October 1944, the *Patronato* of ACLI (the Catholic Workers' Association is not a trade union, but a Church-related association) was activated.⁶¹ In 1945, the *Istituto Nazionale Confederale di Assistenza* (National United Institute of Assistance) (INCA) was created as a *Patronato* of the unitary CGIL. An open competition immediately arose between the two *Patronati* which fell within the controversial discussion on trade union unity.

The implications of a *Patronato* existing within the trade union organization were seen during the first National Congress of the Unitary CGIL, held in Florence in June 1947. Aladino Bibolotti, the first president of INCA, described the philosophy of the *Patronato* as such:

- the worker's life is not limited to the factory;
- social assistance and security issues are typical of the trade unions' actions from their origins as mutualist associations;
- the action of the *Patronato* is considered by the workers as complementary to the trade unions' action.⁶²

In 1947, a new law regulating the action of *Patronati* was passed.⁶³ This law acknowledged that, upon the Ministry of Labor's approval, their constitution and management was ascribed to the "workers associations," the bylaws of which envisaged assistance goals. The main tasks entrusted to the *Patronati* were described in article 1 as assistance, protection, and representation.⁶⁴

When the Christian trade union wing of the unitary CGIL left to create LCGIL in 1948, the new trade union organization did not create its own *Patronato*, choosing instead to refer to the Catholic workers' *Patronato*, ACLI. A separation of roles was thus determined by the trade union action performed by LCGIL and social assistance was recognized as a field of action typical of the Catholic association. When the social democratic and republican wing of the trade unions left unitary CGIL and constituted FIL led by Giovanni Canini in June 1949, they were impelled to create a new *Patronato* agency. This led to the creation of the *Istituto Nazionale di Assistenza Sociale* (National Institute of Social Assistance) (INAS), on September 14, 1949, chaired by Giovanni Canini himself.⁶⁵

61 Giuseppe Pasini, "Associazioni Cristiane dei Lavoratori Italiani (ACLI)," *Dizionario storico del movimento cattolico in Italia* 1, fasc. 2, edited by Francesco Traniello and Giovanni Campanini. Casale Monferrato. (Turin: Marietti, 1981): 172.

62 CGIL, *I congressi della CGIL*, vol II I° Congresso Nazionale Unitario della CGIL. Firenze 1-7 giugno 1947 (Rome: CGIL, 1977): 257-259.

63 D.I.C. p.s. 29 luglio 1947, No. 804.

64 Vito Bellini, *Gli enti di Patronato nell'ordinamento regionale* (Rome, no date), 99-100.

65 B. Tertulliani, "La nascita dell'INAS. Gli avvocati dei poveri" (Unpublished manuscript, 2000).

At the beginning of November 1949, INAS began operating as a *Patronato* of FIL. A circular letter from INAS, dated November 11, 1949, and titled *Organizzazione dell'Istituto. Prime istruzioni* (Organization of the Institute: First Guidelines), was sent to the various provincial offices of the *Patronato* and defined the functions of the new agency: assistance to people injured at work, support for workers in submitting the forms to obtain their pensions, and help for Italians abroad regarding bureaucratic and social security files.⁶⁶ On March 8, 1950, a Ministerial Decree was issued officially approving the constitution of the new INAS-FIL *Patronato* with its head office in Rome.⁶⁷ Annexed to the Ministerial Decree, the first INAS bylaws were introduced. Article 2 identifies the following goals of the Institute:

- assisting workers as per the rules concerning industrial accident insurance in industry, agriculture, and other production activities;
- assisting workers as per the rules concerning professional illness;
- assisting workers as per the rules concerning disability and old age, tuberculosis, involuntary unemployment, marriage, and maternity (...);
- assisting workers as to the application of the existing rules concerning insurance against diseases;
- assisting workers with the documents for migration, both domestic and abroad (...):

With the creation of CISL in 1950 and the influx of both the LCGIL and FIL, the *Patronati* situation was modified again. On July 15, 1950, the INAS Board of Directors decided to adhere to CISL.⁶⁸ At the first CISL National Congress, held in Naples, November 11-14, 1951, the Council bylaws were approved. Article 38 states that INAS is CISL's Assistance Agency. Interestingly, recognition of INAS as the CISL *Patronato* agency represented an important novelty with regard to the previous formulation, typical of the Christian wing in the unitary CGIL and subsequently of LCGIL, which had identified the *Patronato* ACLI as its preferential partner.

The decision of the first CISL executive group to follow a confederate *Patronato* model probably also indicated the need to acknowledge its important role to the lay and socialist component deriving from FIL and regarding the apparent prevalence of the Christian component coming from LCGIL.⁶⁹ The need for greater visibility of the trade union sector in lay culture was reflected in the strategic choice of the first CISL secretary, Mario Pastore, to create a democratic and non-confessional trade union. This provided an alternative to the model of a Christian trade union supported in those years by an important part of the Roman Catholic world. The path taken by CISL represented an important novelty in Italian trade union history after World War II, not contrasting communist trade unionism with Christian organization, but proposing the idea of building a “new” democratic and pluralist trade union.

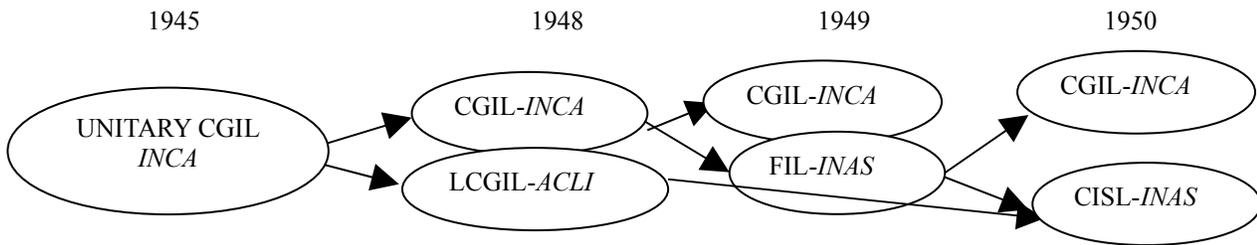
66 No copy of this document has been found at the current national head office of INAS.

67 Gazzetta Ufficiale, March 16, 1950: 798.

68 INAS, “Le tappe della crescita,” *Cogliere la sfida del futuro forti dell'esperienza del passato*, edited by INAS-CISL (Rome: INAS, 1990), 23.

69 The Italian trade union historiography appears to have deleted this plural origin of CISL. We often see an automatic overlapping of the Christian Unionist wing LCGIL and the new CISL trade union, thus denying this founding notion of “New Trade Union.” For instance, there is no specific study about the short but interesting FIL experience.

Figure 1. CGIL, CISL and their Patronati after World War II⁷⁰



During the 1950s, INAS became a valuable organization. Thousands of workers addressed the *Patronato* in order to get free advice and assistance. Thousands of files were opened with regard to industrial accidents, pension rights, support for emigration, tax and insurance issues, etc. *Patronato* operators daily opened up disputes with the agencies that managed social security and assistance. Every day the function of the welfare state system was monitored and assessed by the trade union in its actual operation. During the 1950s, INAS also consolidated itself as a service present on the ground at the workers' disposal. In the report of the Council Secretariat to the second CISL National Congress, held in Rome in April 1955, the reality of INAS was displayed:

Tab. 1. INAS - Provincial offices created

1951	n = 69
1952	n = 76
1953	n = 86
1954	n = 88

Source: CISL, 1955, p. 218

The constant increase in the number of files dealt with was also demonstrated:

Tab. 2 INAS - Number of files

1952	n= 168,471
1953	n= 267,189
1954	n= 400,717

Source: CISL, 1955, p. 218

⁷⁰ Author's elaboration.

INAS's process of structural consolidation also included the beginning of some subsidiary activities. This included the monthly publication of a magazine,⁷¹ the creation of a "Training and Professional Education Center" (CAIP) for the unemployed,⁷² and the beginning of intense training activities for the *Patronato* operators in collaboration with the CISL Study Department in Fiesole.⁷³ Particular attention was given to supporting Italians who had emigrated abroad. In 1953, offices for migrants were opened in France and Belgium.⁷⁴ In the following years, activities in France and Belgium were enhanced and INAS offices were opened in Switzerland and Germany.⁷⁵

While INAS consolidated itself in the 1950s, INCA, the *Patronato* of the CGIL, also developed its activities. In 1948, 1,079,801 workers came to INCA for free advice and assistance.⁷⁶ By 1955, that number had reached more than 1,300,000.⁷⁷ Between 1945 and 1955, the INCA provided the following services:

Tab. 3 INCA - Services Provided (1945-1955)

Pensions, family allowances, unemployment assistance	4,250,000
Subsidies and assistance for diseases	1,850,000
Assistance for accidents and occupational diseases	450,000
Assistance to migrant workers	350,000
Services for workers' children (summer camps, summer and winter holidays, etc.)	575,000
Various subsidies and aids	970,000
Health care and pharmaceutical services	1,750,000

Source: Simone, 2008: p. 53

INCA also began to publish the magazine *L'Assistenza Sociale* and the *Notiziario INCA* (INCA News), a tool for educating employees of the institute, the so-called "corrispondenti INCA" that managed the peripheral sites of the *Patronato*. Each INCA site had a doctor's office and offered legal advice and assistance.⁷⁸

The 3rd National Conference of INCA, held in Naples on October 23-25, 1952, represented a new starting point following the birth of INAS and the end of the unitary Confederation. On this occasion, the three main functions of INCA were identified: to ensure that the existing laws were translated into benefits for all workers, to provide services to workers

71 INAS Board of Directors, log no. 2, Minutes no. 12, January 16, 1953.

72 INAS Board of Directors, log no. 2, Minutes no. 15, April 24, 1954.

73 INAS, "Come si era 50 anni fa," *Almanacco INAS 1993/1997*, edited by INAS-CISL (Rome: INAS, 1997): 53-54.

74 INAS Board of Directors, log No. 2, Minutes No. 14, December 21, 1953.

75 INAS Board of Directors, log No. 2, Minutes No. 27, March 29, 1958.

76 *L'Assistenza Sociale* (September-October, 1947).

77 Andrea Simone, "Stato sociale e mondo del lavoro. Storia del patronato INCA- CGIL," (Dissertation, Università degli Studi di Siena, 2008), 53.

78 Simone, "Stato sociale e mondo del lavoro," 45.

such as summer camps for children, medicines and clinics for workers, etc., and to highlight the shortcomings of the Italian welfare system.⁷⁹ These three functions of INCA synthesized the generally recognized tasks of the *Patronato*: control of the everyday operation of the system of social protection, the direct delivery of services for workers to cover the assistance gaps, and the elaborations of proposals for a new model of the welfare state.

The events concerning INAS and INCA during the 1950s highlight some specificities of the Italian experience. The Italian trade unions' *Patronati* represented a peculiar institution in which the distinction between a state subject and private actor is not clearly defined, with the trade union identity overlapping with a public utility function. In this sense, the Italian *Patronati* represent a hybrid subject that faces the traditional differentiation between the wider concept of "welfare system" and the more specific category of "welfare state" proposed in the literature.⁸⁰ Through the *Patronati*, the Italian trade unions played not only the role of a body of "civil society," they also became an integral part of the welfare state.⁸¹ More specifically, in this case study of the Italian postwar period, the integration of trade unions into the welfare state structure was not just the result of a historical process of functional de-differentiation between the various institutions of the welfare system (family, civil society, NGO, state, etc.), it was an original feature of the system itself.⁸² The *Patronati* were trade union/state-born institutions.

The role of *Patronati* in the everyday life of the people has been so great because they provided their connection with public social assistance. In this perspective, the *Patronati*, typical actors of a welfare system, became a pillar of the welfare state. In fact, if we focus on the experience of the *Patronati*, we discover that the role of the state in social assistance in Italy has probably been more powerful and important than what is usually described in the literature. Since the 1950s, the *Patronati* have provided a web of trade union advisers and counselors that, even if they are not state officials, are paid indirectly with state funding and have acted as gatekeepers to the public assistance. The *Patronati* have not worked as non-profit or private assistance providers supported by the state, but are funded since they connect people to the state social security system.

5. *The Role of Trade Unions in Defining the new Welfare State Regime in the 1960s and 1970s*

According to the previous discussion, in the 1950s the Italian trade union councils CISL and CGIL claimed, on the one hand, to have a structurally unionist character. On the other hand, they proposed an "organic and unitary" model of universal welfare state that recognized the pivotal role of the state. A model of trade union organization emerged that, claiming the peculiarity of union action, did not abandon proposals for a general reformation of Italian society aiming at democratization. In the 1950s, CISL and CGIL proposed a state-dominated idea of a universal welfare state, in which the trade unions and *Patronati* were one pillar in the context of a market society.

In the 1960s and 1970s this cultural attitude became the basis for unionist reform, and the birth of the first model for a universal welfare state in Italy is a direct consequence of trade union

79 *L'Assistenza Sociale* (November 1952).

80 Judith Allen, James Barlow, Jesús Leal, Thomas Maloutas, and Liliana Padovani, ed., *Housing and Welfare in Southern Europe* (Oxford: Blackwell Publishing, 2004): 69-70.

81 Jeffrey Alexander, *Real Civil Societies: Dilemmas of Institutionalization* (London: Sage, 1998).

82 Allen, *Housing and Welfare in Southern Europe*.

action. In particular, from 1968-1978, the trade unions implemented legislative innovations for a new system of Italian social policy. Of the new laws introduced in this period, the most significant were: the pension reform of 1969, the reform of unemployment benefits (the so called “cassa integrazione”) in 1972, two reforms of housing policy with the introduction of the “equo canone” [fair rent] in 1971 and 1978, the reform of family law of 1975, and the health care reform of 1978. All these legislative achievements were part of the union strategy called “Lotte per le Riforme” (Struggles for Reforms) that aimed to radically change the Italian model of development.⁸³ This exemplifies the typical “supplenza sindacale” (union substitution) with respect to the action of political parties.⁸⁴ With this strategy, the Italian trade unions radically consolidated their autonomous and direct role in the political system, as described by Reyneri.⁸⁵

A typical example of the relationship between unionist action and legislative innovation was the struggle for pension reform in 1968 and 1969.⁸⁶ It started with the general strike, called on March 7, 1968, for an increase in pensions. The unions then went on to articulate a platform of legislative proposals for a general reform of the pension system. Various actions were launched in support of this proposal until the new general strike for the pension reform of February 5, 1969.⁸⁷ The unionist pressure was successful and the new law was approved based on the union platform.⁸⁸ First, the reform increased pensions with a new method of calculation: after thirty-five years of work an individual could receive 74% of his/her average wage of the last five years. There was also indexing of pensions according to living costs. Furthermore, it represented the first step beyond segmented welfare in favor of a more universalist model. In fact, it set out a social pension for all citizens over 65 years old who had no other forms of income. The criterion was to devolve to the holders of social pension rights the capital contributions collected from the working population.⁸⁹ In general, the new law showed that they had overcome the traditional insurance model that had previously characterized the Italian pension system.⁹⁰

The model of union action based on the development of legislative proposals was supported by actions such as strikes and demonstrations that accompanied the negotiations with the political power. This also characterized reformist policy in various other areas and led to significant legislative developments. Of these, the healthcare reform of 1978 was very paramount and represented the end of the fragmented model that had characterized the Italian health system hitherto.⁹¹ The main feature of the new reform was that it ensured universalist criteria of health benefits provided by the state to all citizens.⁹²

Their reformist action also made the Italian trade unions important players in battles for civil rights and gender equality. Their reciprocity with social movements, such as the feminist and student movements, was an important factor that helped CGIL and CISL to go beyond the

83 Georges Couffignal, *I sindacati in Italia* (Rome: Editori Riuniti, 1979), 328.

84 Marino Regini, *Il dilemma del sindacato* (Bologna: Il Mulino, 1981).

85 Emilio Reyneri, “Il “maggio strisciante”: l’inizio della mobilitazione operaia,” *Lotte operaie e sindacato: il ciclo 1968-1972 in Italia*, edited by Alessandro Pizzorno, Emilio Reyneri, Marino Regini, and Ida Regalia (Bologna: Il Mulino, 1978), 50.

86 Masulli, “Cittadinanza e stato sociale in Italia,” 203-204.

87 Gloria Regonini, “Stato e sindacati nella formazione della politica della sicurezza sociale. Il caso delle pensioni,” *Quaderni della Fondazione G.G. Feltrinelli*, n. 10. (1980).

88 Law number 159/1969.

89 Masulli, “Cittadinanza e stato sociale in Italia,” 204.

90 Massimo Paci, “Onde lunghe nello sviluppo dei moderni sistemi di welfare,” *Stato e mercato* 6 (1982): 6.

91 Law number 833/1978.

92 Masulli, “Cittadinanza e stato sociale in Italia,” 212.

typical unionist issues. For example, the reform of the family law of 1975,⁹³ introduced equality between men and women within the family and was inspired by the interplay between unions and the feminist movement.⁹⁴ In general, the reformist achievements of the 1970s questioned the patriarchal-familist cornerstones of the Italian welfare state. In this framework, trade unions led the battles to protect working mothers with the law of 1971,⁹⁵ for childcare that same year,⁹⁶ and for the law on gender equality in the labor market in 1977.⁹⁷

To summarize, the “pan-syndicalism” attitude of Italian trade unions was clearly manifest during the 1960s and 1970s. It was inside trade unions that the idea of a universal and gender-equal welfare state was theorized, and it was also within the labor movement that strategies and battles to apply these ideas had their origins. The result was a sort of universal-neo-corporative system based on direct bargaining between political powers and unions in order to fix social and civil rights for all citizens.

More generally, between the 1950s and 1970s Italian trade unions, in particular CISL and CGIL, contributed to a new model for Italian social policy through their structural reform initiatives and the implementation of the *Patronati*. This discussion has tried to demonstrate that it was a unique “union way” that worked in Western Europe. In fact, the Italian trade unions sought to be, and indeed became, protagonists in both the implementation and the operation of the welfare state. In this framework, CISL and CGIL acted in order to build a universal welfare state because it was also advantageous for the section of society they represented. At the same time, the *Patronati* allowed them to manage some areas of the welfare state in a way that can be described neither as private or as non-profit management, but as a peculiar and original hybrid state approach.

6. *Beyond the corporate-clientelistic and patriarchal-familist characters of Italian welfare?*

As I explained above, the Italian welfare state experienced tremendous change, led by trade union action. Both the role played by the union movement and the inclusion of significant elements of universalism in the system are two key features to the Italian experience during the 1960s and 1970s. The question is: can we really dismiss the corporate-clientelistic and patriarchal-familist characteristics of Italian welfare on the basis that a union-based universal welfare system arose in the 1970s? The literature usually focuses on two seemingly contradictory aspects of the system: the persistence of the structural aspects of clientelism and familism and the success of the trade union struggle for reform in the 1960s and 1970s.

As Ugo Ascoli wrote, the Italian welfare state is often described by five negative “fundamental characteristics”: it is particularistic, clientelistic, dualistic, based mainly on income transfer rather than services, and largely characterized by a familistic and patriarchal culture.⁹⁸ The particularistic aspects of the Italian system could be the consequence of the persistence of a culture that linked the enjoyment of social rights to labor market participation. Clientelism,

93 Law number 151/1975.

94 Yasmine Ergas, “Allargamento della cittadinanza e governo del conflitto: le politiche sociali negli anni Settanta in Italia,” *Stato e mercato*, n. 6. (1982), 6.

95 Law number 1274/1971.

96 Law number 1044/1971.

97 Law number 903/1977.

98 Ascoli, “Il modello storico del Welfare State italiano,” 215-223.

instead, would be the result of the “political exchange” based on the social services provided to the citizens by the state. With regard to the geographical dualism between northern and southern Italy, these characteristics are reflected in the historical regional imbalance of Italian development. Moreover, the literature tends to describe the bulk of public resources involved in the social protection system as consisting of income transfers more than of services. Finally, Ascoli highlighted the persistent elements of familism in the Italian welfare state as a result of behaviors rooted in Italian culture, such as the gender division of labor both in the workplace and in everyday family life.

According to Ascoli’s description, the Italian welfare state has not changed since the 1950s. On the contrary, it is undeniable that the 1960s and 1970s were a major break in the history of Italian social policy. The reform of the pension system and the healthcare system, as well as the reform of family law and the housing policy, represent a structural change. In general terms, for the first time in Italian history, they introduced some aspects of universalism into the welfare state, even if there were major limitations and contradictions, some of which were presumably clientelistic or paternalistic in nature.

Moreover, some aspects of the Italian experience are usually underestimated in the literature. For instance, the hybrid nature of the Italian *Patronati* is not only an interesting matter relevant to the connections between “welfare society” and “welfare state,” it also affects the discussion of the so-called “welfare regimes.” In particular, the presence of *Patronati*, and more generally the role played by the trade unions, in the operations of the Italian welfare state, is not perfectly consistent with the traditional interpretation that sees the Italian case as a conservative and corporatist example of a capitalistic welfare regime with the basic features of familism and clientelism.⁹⁹

On this subject, the history of CISL and CGIL’s debates over the welfare state between 1945 and 1960, INAS and INCA’s activities, as well as the union struggle for reforms in the 1960s and 1970s reveal important factors that do not match the traditional representation of the Italian pattern of the welfare state. The first is the trade union attitudes toward the welfare state problematic that took the perspective of “general interest.” Paradoxically, the so-called corporatist regime of the welfare state was characterized by the presence of a strong non-corporatist trade-unionism culture.

The Italian welfare state has been the battlefield between different cultures. After World War II, the traditional, corporate-clientelistic and patriarchal-familist setting was challenged by a universalist, but also conflictual approach. The central role of trade unions in support of this innovative approach represents an important and unique characteristic of the Italian experience. It was also a consequence of the wider political, economic and social context. During the Cold War, Italy was a boundary country with a strong Communist party and little political autonomy inside the Western bloc. The limited potential of its political actors, the need to limit class conflict, the existence of poverty and the lack of social protection, and the strong presence of a variety of pro-worker-oriented traditions (Communist, Socialist, Social Democratic, Catholic, etc.) created the conditions for a sort of “pan-syndicalism attitude.” As described in this article, one important consequence of this approach was the “union way” to the welfare state. Moreover, the “pan-syndicalism” approach was also supported by the interplay between unions and other social movements, such as the feminist movement.

99 Gøsta Esping-Andersen, *The Three Worlds of Welfare Capitalism* (Cambridge: Polity Press, 1990); Claude Martin, “Social welfare and the family in Southern Europe,” *South European Society and Politics. Special Issue on Southern European Welfare States* 1 (3), edited by Martin Rhodes (Winter 1996), 23-41; Valeria Fargion, “Social assistance and the North-South cleavage in Italy,” Rhodes, *South European Society and Politics*, 135-154.

On a more theoretical level, only the presence of conflicting unions, such as the CISL and the CGIL during the 1960s and the 1970s, provided the means needed to fashion a universalist Italian social policy system, even if it was with major contradictions and limitations.

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