The social message of John Paul II’s encyclicals in the implementation of horizontal principles in EU projects

As it is indicated by the analysis of source documents and literature of the subject, John Paul II can be considered a proponent of human rights, which has been expressed in particular in his numerous works. During his pontificate, Pope John Paul II issued many encyclicals and other documents in which he discussed the issues *ad naturam* of human rights in many aspects (not only in the context of the teaching of the Catholic Church), including pointing to the essential social and individual value of human dignity, freedom and social justice for a particular man. The issue of social values is at the same time the essence of horizontal principles, which should be implemented for the benefit of society in connection with the implementation of projects co-financed from European Union funds. Although the strategic documents of the EU, which specify the concept of “horizontal principles”, do not directly indicate the inspiration of the achievements of John Paul II’s social thought, in the opinion of the authors, the requirement to implement horizontal principles in EU projects is part of the essence of the message of papal encyclicals.
Key words: encyclicals of John Paul II, horizontal principles, EU projects, economic and social policy.

Introduction

As the analysis of source documents and literature on the subject indicate, John Paul II can be considered a proponent of human rights. During his pontificate, the Polish Pope issued among others many encyclicals in which he characterized the issues of ad naturam of human rights in many aspects, pointing e.g. the importance of human dignity, freedom, work, property, as well as social justice. The issue of these values, especially in the field of “full accessibility”, is at the same time the essence of horizontal principles that should be implemented for the benefit of society in connection with the implementation of projects co-financed from European Union funds. Although the strategic documents of the EU, which specify the concept of “horizontal principles”, both from several decades ago and those in force in the perspective of 2021-2027, do not directly indicate the inspiration of the achievements of John Paul II’s social thought, in the opinion of the authors, the requirement to implement horizontal principles in EU projects is part of the essence of the message of papal encyclicals.

The aim of this article is therefore to answer the research question whether the need to implement horizontal principles in the implementation of projects financed from European Union funds is part of the social message of the encyclicals of Saint John Paul II. Therefore, the authors made a critical analysis of the literature on the subject and source documents. On the basis of their own professional experience related to the development of strategic documents formalizing the process of applying for investment support from public funds, they also prepared relevant potential examples in the implementation of horizontal principles in EU projects. This study is an extension of the authors’ previous research, the results of which are presented in the following publications: “The principle of equal chances versus the concepts of labor market”, characterizing the socially important policy of “equal opportunities and non-discrimination” in the single EU internal market, as well as “Competitiveness of an enterprise – a potential applicant for support from European Union funds. Case study

in the field of financial analysis”\(^2\), the subject of which is an analysis of the issue of competitiveness of an entity managing not only on the domestic market, but also conducting international expansion on the Euromarket in accordance with horizontal EU policies.

The Social “Dimension” of John Paul II’s Encyclicals

Pope John Paul II promulgated fourteen encyclicals during his 26-year pontificate. According to the authors, their fundamnet is the teaching of the Second Vatican Council, the essence of which was dialogue in the Community and openness to entities from its environment. In fact, in all of them, to a greater or lesser extent, the Polish Pope referred to social issues. The following encyclicals should be mentioned as the most important in the social sphere: *Redemptor Hominis*\(^3\), *Laborem Exercens*\(^4\), *Sollicitudo Rei Socialis*\(^5\), *Centesimus Annus*\(^6\), *Fides et Ratio*\(^7\). In them, John Paul II is believed to have expressed in detail and


\(^3\) John Paul II, *Supreme pontiff encyclical letter REDEMPTOR HOMINIS to His Venerable Brothers in the Episcopate, the Priest, the Religious Families, the Sons and Daughters of the Church and to all Men and Women of good will at the beginning of his papal ministry*, https://www.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_04031979_redemptor-hominis.html (10.09.2023).


\(^7\) John Paul II, *FIDES ET RATIO of the supreme pontiff John Paul II to the Bishops of the Catholic Church on the relationship between faith and reason,*
in depth his position on issues related to human rights, emphasizing their inseparable connection with the teaching of the Catholic Church, including its social teaching and fundamental Christian values.

*Redemptor Hominis*, John Paul II’s first encyclical, published in 1979, emphasizes the value and dignity of every human person and his or her rights and freedoms. As K. Swatkowski points out,

John Paul II mentions a number of types of freedom. On the basis of the Pope’s teaching, we can indicate the freedom of: speech, science, culture, thought, conscience and belief, religions and beliefs practiced, choice of a specific status or profession, freedom to found a family, freedom to found associations and assemblies, freedom of movement within and out of the country, pace of life (...). For the Pope, man is a free being (...). So freedom is not only something that is right to man, but it is part of his nature.\(^8\)

In turn, W. Karasiński points out that in this encyclical for the first time

the Pope points to the word “ability”, which defines man as a subject of responsibility. In this sense, freedom is the inalienable foundation of human action, indicating the directions of his action or omission. As far as man’s ability to choose is concerned(...), freedom becomes the source of responsibility for his actions.\(^9\)

It should be mentioned that the issue of the “ability” – de facto “empowerment” of an individual to act independently for his own good, as well as the social good, the Polish Pope returns many times in his later encyclicals. For him, freedom is the essence of humanity. It is indispensable in actions or deliberate omissions rationally chosen by the individual, and in fact by “all” members of the Community.

The third encyclical of John Paul II, published in 1981, *Laborem Exercens* discusses the rights of workers and the value and subjectivity of human work, emphasizing the importance of decent work for the development of the individual and the whole society. In its content, he refers to *Redemptor Hominis*, indicating that man has the right to work, de facto “choice” of work, providing him with a dignified existence and giving him the opportunity to develop. In its preamble *Laborem Exercens* the Polish Pope states:


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Man is to eat daily bread from his work and through work he is to contribute to the continuous development of science and technology, and especially to the continuous improvement of the cultural and moral level of the society in which he lives as a member of a fraternal community. Work means every activity which a man performs, whatever its nature and circumstances, that is, every human activity which can and must be considered work in the midst of all the richness of the activities of which he is capable and disposed of by his very nature, by his very humanity.\textsuperscript{10}

This thought is particularly important not only in the historical context of the creation of \textit{Laborem Exercens}, i.e. then global economic crisis, the intensified Cold War and the activation of the Polish social movement – the “first Solidarity”, but they are also valid today – in the era of globalization, internationalization and digitization, where, according to the authors, but only apparently, the importance of human work in the social and economic aspect is decreasing.\textsuperscript{11}

The encyclical \textit{Sollicitudo Rei Socialis} from 1987 concerns the eponymous, how important especially in the world of that time, which was on the verge of systemic transformation, the eponymous “care for social issues”, not only the primacy of “efficiency and profit”. Her rhetoric focuses on the issue of “social justice”, understood especially in the category of the need to intensify economic development, and at the same time the responsibility of the authorities, but also society for the poor and needy. In the introduction to the main part of this document, John Paul II indicates among others that the teaching, and therefore more broadly the Church’s activity in the social field, should be subject to “necessary changes dictated by various historical conditions and the constant course of events in which the life of individuals and societies passes.”\textsuperscript{12} The Polish Pope correctly diagnoses the cause of social inequalities in the internationalized and at the same time strongly corporatist world economy, writing:


we stand (...) in the face of the grave problem of the unequal distribution of the means of necessities which are naturally intended for all people, and therefore also of the benefits deriving from them. This is not the fault of the handicapped masses, much less because of inevitable necessities arising from natural conditions, or by coincidences in general (...). The very concept of development, seen in the perspective of universal interdependence, is undergoing a significant change. True development cannot consist in the mere accumulation of wealth and the possibility of making greater use of goods and services, if this is achieved at the expense of the underdevelopment of the masses and without due consideration for the social, cultural and spiritual dimensions of the human being.\(^\text{13}\)

In the opinion of the authors, it is difficult not to agree with the theses concerning the creation and redistribution of the product contained in the encyclical *Sollicitudo Rei Socialis*. They are also very relevant today, after the crisis caused by the COVID-19 pandemic, one of the effects of which was the above-average profitability recorded in the pharmaceutical sector... The question remains open: at whose expense?\(^\text{14}\)

The encyclical *Centesimus Annus* published in 1991 on the occasion of the hundredth anniversary of the publication of another, important in the socio-economic aspect encyclical *Rerum Novarum*, objectively characterizes, in the opinion of the authors, de facto returns to the principles of the social teaching of the Church from almost a century ago and emphasizes the importance of the free market characterized at that time by Pope Leo XIII, and at the same time the need to respect workers’ rights and obligations of the state towards society – citizens.\(^\text{15}\) John Paul II, referring to the dynamics of the world system from nearly 100 years ago – the decline of Pax Britannica, writes e.g. that “in the field of economy, in which discoveries and applications of exact sciences were used, a new structure of production of consumer goods was gradually formed. A new form of property — capital — a new form of labor — wage labor appeared, the characteristic feature of which was that the arduous rhythm of production was determined only by the desire to increase productivity and multiply profit, without taking into account factors such as gender, age or family situation of

\(^{13}\) Ibidem.


the employees. Labor thus became a commodity that could be freely bought and sold on the market, and whose price was determined by the law of supply and demand, regardless of the minimum subsistence necessary for the livelihood of the person and his family. The employee was not even sure that he would be able to sell his “goods”. He was constantly threatened by unemployment, which, in the absence of social welfare, put him in front of the spectre of starvation.”\(^\text{16}\)

It should be noted that in *Centesimus Annus* the Polish Pope emphasizes that the regulatory and countercyclical actions of the authorities in the sphere of economy and the policy pursued should serve the dignity and freedom of every human person. Humans, citizens, should not be seen by the authorities as “tools” to achieve only their economic or political goals, but as independent subjects – beings with dignity and “ability” to direct their lives. This encyclical unequivocally stands on the side of the individual’s right to own private property, emphasizing that it is in fact a “natural” right that should be effectively protected by society and the state. What is important, in the encyclical *Centesimus Annus* John Paul II refers to the principle of subsidiarity, which says that decisions should be made at the lowest possible level – where it is possible, and local and regional authorities representing the society of “small homelands” should have autonomy and control over methods and tools of activating development.\(^\text{17}\) The authority at the national level in this aspect should prepare only general standards of conduct – strengthen the rights of citizens and communities.\(^\text{18}\)

The last of the encyclicals of John Paul II *Fides et Ratio* from 1998 indicated by the authors emphasizes in the social sphere the importance of science and culture for activating the development of the individual as well as the whole society. On the other hand, however, he points out that in the community one cannot be content only at the primacy of technology in social life: “it remains true, however, that there is still a kind of positivist mentality that has not abandoned the illusion that, thanks to the achievements of science and technology, man can,


like a demiurge, ensure complete control over his fate.”\textsuperscript{19} The Polish Pope also points out that man is a social being – he functions among others in the family:

man is not created to live alone. He is born and grows up in a family in order to later integrate his work into social life. From the day of his birth, therefore, he is integrated into various traditions, taking from them not only language and cultural formation, but also many truths in which he believes, as it were, instinctively. During the growth and maturation of the personality, these truths can be challenged and subjected to critical evaluation, which is a special form of thought activity. But when this process is accomplished, it happens that man again accepts the same truths, based on his own experience or on the reasoning he has carried out.\textsuperscript{20}

In conclusion, Pope John Paul II in his encyclicals, characterizing the individual and society in a postulative approach, points to the need to ensure freedom for man and the community, respect for individual activity, and therefore private property, universal application of the principle of subsidiarity in social life, as well as taking care of the “weaker”, and thus universal solidarity. In turn, the state is to be responsible for protecting individual rights, ensuring social justice and promoting the “common good”.

**Horizontal principle of equal opportunities in the draft financial perspectives of the EU until 2020**

In historical terms, the primary horizontal principle implemented from the point of view of social interest within the framework of European Union projects was “equal opportunities”, the essence of which corresponds to the “direction” to the needs and aspirations of the individual, which is the subject of postulates contained in the content of papal documents indicated in the earlier part of the article. It should be mentioned that from the formal point of view, the guidelines on “equal opportunities” prepared several years ago in the EU did not explicitly indicate the use of John Paul II’s encyclicals in their preparation. Nevertheless, a reading of the strategic documents on guaranteeing the “equality approach” indicates the identity of the issue of “equal opportunities” both in the documents of the Catholic Church and in the norms prepared by the essentially secular bodies of the EU.


\textsuperscript{20} Ibidem.
The principle of equal opportunities provides precisely the possibility of participation in the labor market of people and social groups potentially excluded from it to some extent. The practice of its application assumes the need to eliminate barriers in free access to the labor market, which, as it should be noted, from the point of view of “social justice”, is a postulate indicated earlier by the Polish Pope in his first encyclical. As noted in the relevant guidelines for the previous programming periods, i.e. 2007-2013\textsuperscript{21} and 2014-2020\textsuperscript{22}, good practices on “equal opportunities” include:

1. Elimination of discrimination in the labor market, including gender disproportions, as well as elimination of mobbing.
2. Ensuring access to buildings and their spaces by persons with disabilities (including those with motor and intellectual disabilities, autism spectrum disorders, deaf, visually impaired and blind people) in order to provide them with unlimited mobility and free employment opportunities.
3. Facilitated access to education (including co-financing of training provided by the entrepreneur for his staff), e.g. regardless of the employee’s degree of mobility.
4. Providing a system of care for relatives of employees (including company kindergartens, nurseries, stationary day care for bedridden people).
5. More flexible working conditions, including, for example: flexible working hours (it is possible to set your own working hours between the employee and the supervisor); work from home (remote performance of assigned duties), in connection with the performance of which the employer provides, among others, the necessary computer equipment and other necessary equipment of the workplace, including the installation of broadband access at


the employee’s home; part-time work; evening work; possibility to work one day a week (or a few hours during the adopted account period of a week) at home online, if the nature of the job permits. In connection with the implementation of the principle of equal opportunities, employers should be motivated to eliminate barriers to free access to the workplace. In this respect, it should be considered constructive to indicate the need to implement measures to eliminate disparities in equal access to employment:

the project has a positive impact on the horizontal policy of the EU listed in Article 16 of Council Regulation (EC) No 1083/2006, if (...) contributes to equal opportunities on the labor market, (a) (...) thanks to its implementation it will be possible to implement (...) actions taken to eliminate existing or potential barriers to access to existing or planned positions (...)

which is related to the role of the state in the economy, rather as a regulator of processes than a participant in the “market game”, which was emphasized in the encyclicals of John Paul II.

Horizontal principles in the draft EU Financial Perspectives until 2027

Currently, i.e. in the EU financial perspective for 2021-2027, four horizontal principles should be implemented, the implementation of which can be considered important from the point of view of respecting individual rights, as well as in the social context, which is a postulate of e.g. encyclicals of John Paul II indicated in the earlier part of the article. According to Article 9 of Regulation (EU) 2021/1060 of the European Parliament and of the Council:

1. Member States and the Commission shall ensure respect for fundamental rights and compliance with the Charter of Fundamental Rights of the European Union in the implementation of the Funds.
2. Member States and the Commission shall ensure that equality between men and women and gender mainstreaming are taken into

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account and promoted throughout the processes of preparation, implementation, monitoring, reporting and evaluation of programs.

3. Member States and the Commission shall take appropriate steps to prevent any discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation during the preparation, implementation, monitoring, reporting and evaluation of programs. In particular, accessibility for persons with disabilities should be taken into account in the preparation and implementation of programs.

4. The objectives of the Funds shall be pursued in accordance with the objective of promoting sustainable development as set out in Article 11 TFEU and taking into account the United Nations Sustainable Development Goals and the Paris Agreement and the principle of ‘do no serious harm’.25

Good practices for the implementation of horizontal principles indicated in Article 9 of Regulation (EU) 2021/1060 of the European Parliament and of the Council include actions recommended in previous financial perspectives of the European Union, in particular for people with disabilities, currently developed in the concept of universal accessibility referred to as “universal design.”26

As part of the preparation for the implementation of the project, in accordance with the “Charter of Fundamental Rights of the European Union”27, which contains rights and principles in relation to: dignity, freedom, equality, solidarity, civil rights and justice in the European Union, the beneficiary of support from EU funds is obliged to ensure respect for horizontal principles at every level of the implemented project, which consists of management activities in the context of the project being financed, the purchase of goods and services necessary for its implementation, as well as the sale of services in the single internal market. In the “management area”, the persons delegated to implement the project should be selected on the basis of actual skills, knowledge and experience, and the scope of their work should be specified and adapted in such a way as to enable the project staff “personal and professional development and ensure the possibility

26 M.M. Perkowska, T. Bajkowski, Universal design in the university space-ideas, possibilities, good practices, Bialystok 2022, pp. 213-230.
of reconciling professional and personal life”. Employees – project staff should be employed on the basis of qualifications – regardless of gender, and their remuneration should correspond to the rates applied by the beneficiary of support for similar positions. Every person employed under the project should be provided with the right to free speech, formulation of proposals, comments, ideas affecting the efficient and effective implementation of the project. In case of inaccuracies, misunderstandings or conflicts, the project coordinator should try to resolve the issues through dialogue. As it follows from the above, within the framework of project personnel management, attention should be paid to the subjectivity of each person involved in its implementation. Respect for the rights of project personnel is important in this respect. It should be emphasized again that despite the lack of formal reference to the documents authored by John Paul II in the content of the strategic document, their message and logic, which presents somewhat a human being as a subject, not an “object of action”, has been preserved in the “guidelines” for the implementation of projects financed from EU funds.  

The purchase of services (including construction services among others under the “design and build” concept) and goods necessary for the project should be carried out in compliance with the procedures applicable to expenses incurred under public funds, and the procedures carried out should be carried out with standardized document templates, transparent procedures, devoid of provisions that may be considered discriminatory. According to the authors, this confirms the concept of the functioning of economic power characterized in the documents authored by John Paul II, who indicated as the proper model of economic power, not so much the direct participation of the authorities in economic processes, but the creation of conditions for their efficiency. It should be reminded that the Polish Pope was a supporter of the free market, of course respecting and realizing workers’ rights and ensuring participation in social life for the “weaker”.

The horizontal principles for the implementation of EU projects also indicate the need to select external contractors based on experience, in order to ensure the best possible results in the project in proportion to the expenditure incurred. In the authors’ opinion, this is consistent with the message of the encyclicals of John Paul II, in particular the indication of effective use of resources at the disposal of society and honesty – also in the context of respect for the rights of business partners. It should be noted that the procedures to be used for the

implementation of projects should indicate the rights and obligations of parties wishing to establish cooperation, and the project documentation is to be made available on uniform terms to all interested parties in the implementation of a given project, including social partners. The conditions of admission to participation in the project should include objective rules for the recruitment of its participants, and an indisputable and multifaceted assessment by persons unrelated to the potential beneficiary of support is to be ensured, which is also associated with the postulate of creating rules, and not strictly the participation of “authorities” in economic processes, as John Paul II wrote.

Conclusion

The social and economic thought contained in documents, especially the encyclicals of John Paul II, is particularly important in modern times. Although the papal documents were prepared a dozen or even several dozen years ago, their message is still valid. The essence of socio-economic postulates contained in the encyclicals of John Paul II is respect for every human person, the primacy of work and honesty, care on the part of the authorities for the efficiency of economic processes, but with the application of the principle of subsidiarity and respect for the rights of the “weaker”. These issues have been the subject of interest and regulation by the European Union in recent years e.g. within the framework of “horizontal principles” that should be implemented in projects financed from EU funds, which, in the authors’ opinion, should be considered the most appropriate both from the point of view of the effectiveness of support for beneficiaries and the implementation of social interest. However, it is a unfortunate that in the strategic Community documents, in which “horizontal principles” are indicated, there is not even a brief mention of which documents from the 1970s, 1980s and 1990s contained their original concept and who was its author.

Bibliography

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5. John Paul II, *Supreme pontiff encyclical letter REDEMPTOR HOMINIS to His Venerable Brothers in the Episcopate, the Priest, the Religious Families, the Sons and Daughters of the Church and to all Men and Women of good will at the beginning of his papal ministry*, https://www.vatican.va/content/john-paul-ii/en/encyclicals/documents/hf_jp-ii_enc_04031979_redemptor-hominis.html (10.09.2023).


