

# ELEMENTS OF EPISTEMOLOGY FOR THE STUDY OF SOLIDARITY

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## ABSTRACT

The article proposes to discuss the theme of solidarity by relating it to changes in society, therefore, an overview will be offered of the dynamics and challenges - in relation to solidarity - that evolve due to the continuous changes in society, in a repeating circle. The idea is, therefore, to constitute a reflection on solidarity, using a metatheoretical approach suitable for so-called second-order studies such as the one presented here. The article develops from the problematisation of the definition of this concept, from a brief history of the idea of solidarity to arrive at epistemological aspects for the study of solidarity, which, beyond the individual declinations of it, allows us to explore the processes that take place on different levels (individual, social and cultural) for individuals whenever they interact with other individuals or with structures of society. The results arrived at by this theoretical study highlight the need to take into account the following changes occurring in society (a) the modification of risk maps that leads to the demand for new interventions to meet the renewed system of needs; (b) the emergence of the relationality dimension as an area of social distress; (c) the relativisation of knowledge that is often challenged by the information provided by the mass media; and, finally, (d) the non-linear development of social dynamics and technological transformations, which make it mandatory to update, innovate and modify knowledge to face the continuous challenges of society.

**Keywords:** Solidarity, Epistemology, Social sciences, Metatheoretical approach, Social change.

*Elementos de epistemología para el estudio de la solidaridad*

## RESUMEN

El objetivo de este artículo es discutir el tema de la solidaridad en relación a los cambios en la sociedad. En este sentido, por lo tanto, se ofrecerá un panorama de las dinámicas y desafíos que evolucionan debido a los continuos cambios en la sociedad, en un círculo que se repite. Se

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trata entonces de constituir una reflexión sobre la solidaridad, utilizando un enfoque meta teórico adecuado a los llamados estudios de segundo orden como el que se presenta. El artículo se desarrolla a partir de la problematización de la definición de este concepto, a través de una breve historia de la idea de solidaridad para llegar a los aspectos epistemológicos para el estudio de la solidaridad, que más allá de sus declinaciones individuales, nos permite explorar los procesos que las llevan a cabo y que para los individuos tienen lugar en diferentes niveles (individual, social y cultural) en el momento en que interactúan con otros individuos o con estructuras de la sociedad. Los resultados alcanzados por este estudio teórico resaltan cómo para analizar la solidaridad es necesario tener en cuenta los siguientes cambios que se están produciendo en la sociedad: a) la modificación de los mapas de riesgo que lleva a la solicitud de nuevas intervenciones para satisfacer el renovado sistema de necesidades; b) el surgimiento de la dimensión de la relacionalidad como ámbito de penuria social; c) la relativización del conocimiento, muchas veces cuestionada por la información proporcionada por los medios de comunicación; y, finalmente, d) el desarrollo no lineal de las dinámicas sociales y las transformaciones tecnológicas, que obligan a actualizar, innovar y modificar el conocimiento para enfrentar los continuos desafíos de la sociedad.

**Palabras clave:** Solidaridad, Epistemología, Ciencias sociales, Enfoque meta teórico, Cambio social.

## Introduction

Some open questions date back to the birth of sociology, one of which is certainly the debate on solidaristic morality or social solidarity. The opening of this debate is not due to the social sciences. In fact, since antiquity, social scientists (philosophers first) have tried to understand and explain the grounds for which, in certain situations, some individuals enact positive relationships and actions in favour of the social (heterodirected) and the reasons why, in similar situations, the same men do not behave in the same way. This attention is due to the fact that, as the social sciences, and primarily sociology, were developing and constituting themselves as an autonomous body of knowledge, increasingly broader categories of social phenomena were “subtracted” from the speculations of philosophers and from “moral or political discourse” to constitute new objects of study for the nascent disciplines. From the 18th century onwards, moral statistics, demography and sociology expressed a specific way of observing and collecting data on the emerging reality (the nascent society) that had given rise to society with great transformations. The analysis of phenomena is brought back to experience and breaks with tradition: *homo sociologicus* becomes the object of study.

And today, more than yesterday, it is necessary to reinforce and revitalise these studies, starting from the changes and innovations that have characterized the last decades, and that continue to take place thanks to globalisation processes, have not reduced aspects of inequality between territories and populations, and between parts of populations within the same territory. The spread of the SARS-CoV-2 virus that produced a pandemic state was still another demonstration of this condition, accentuated also by the inadequacy of some governments' interventions. The social policy systems already in crisis (traceable to the various welfare state models), have completely collapsed and in many cases only replaced by individual or collective

intervention typical of the mutual aid or mutual aid described by Kropotkin (1902), which has more often than not resulted in solidarity actions.

If the pandemic that we are now leaving behind has taught us one thing, it is that collective wounds require collective strategies to emerge from crisis or emergency. But collective wounds are not only those caused by pandemics or disasters, but also all those that occur with the widening equality gap that takes more and more parts of populations, in many areas of the world, below the poverty line. Considering these forms of disruptions in daily life allows us to open up a reflection on the role of a particular form of action that is "solidaristic", which can be adopted by all individuals in different ways and according to their abilities. What Arendt (1958) called *praxis* (action) capable of recognising pluralities and defining a political culture of modernity. About this, we agree with Slavoj Žižek (2020) when he emphatically claims that a new economic order needs to be redesigned, but this alone is not enough, I personally believe it is necessary in its urgency to redesign political systems as well. The current political and market systems, in fact, are the result of a series of changes and reforms imposed by the need to combine the growing expectations of the population with ever-higher quality standards (not always corresponding to real needs) and the scarcity and decrease of financial resources. Economic systems, which are capable of influencing political systems, are the result of a progressive affirmation of the "market economy" (Doti & Lee, 1991), which has dramatically undermined political control: in fact, even if political systems arise from the promotion of the collaboration of different levels of political responsibility (international, national, and local) they fail (this was the case even before the health emergency) to control monetary turbulence and to guarantee a system of goods and services that is fair and responsive to the real needs of the citizenry, and this is true both for the Western world and for other parts of the world (think of the African continent or Latin America).

In the light of this, this article proposes to reflect on the theme of solidarity by relating it to changes in society, therefore, an outline of the dynamics and challenges that often evolve in a repeating circle will be offered. The idea is, therefore, to constitute a reflection, starting from the idea of solidarity that has evolved historically, to arrive - through the analysis of epistemological and methodological aspects for the study of solidarity - at the problematisation of the definition of this concept. It is essential to overcome and go beyond the individual and different declinations of the concept, in order to explore the processes that develop along different dimensions (social, cultural, and individual) every time individuals interact with structures of society or with other individuals. In order, therefore, to outline the aspects that characterize the study of solidarity, a metatheoretical approach was applied (Ritzer, 1990, 1992) - which will be described in the central pages of the article - suitable for so-called second-order studies such as the one presents. The need to apply this approach to the study conducted on social solidarity is inherent in the objective set.

### **A brief history of the idea of solidarity**

After the necessary preamble indicating to the reader the thread by which we will proceed along this path that tends to highlight not only the theoretical but also the practical aspects related to social solidarity, the time has come to focus attention on this object starting with a brief history of it.

The title of this section, in part, paraphrases the title of Blais's (2007) book, *La solidarité. Histoire d'une idée* [Solidarity. History of an idea], in which the author highlights precisely the historical evolution of the concept of solidarity, emphasising, however, its problematic implications despite being a key word. Obviously, a summary of the book will not be made here, leaving it to the reader's discretion to delve deeper, but I will limit myself to highlighting some salient historical passages in the evolution of the idea of solidarity.

The historical moment that most influenced ideas concerning the conception of man, and of man living in differentiated forms of social organisations, was undoubtedly the Enlightenment, and the idea of solidarity followed the same course. The first to be recalled is Adam Smith and the school of political economy. For the specificity of the subject of this contribution, the reference is to the book, *The Theory of Moral Sentiments* (Smith, 1767) in which he tends to explain that the aim of man's moral life is to maintain (over time) the highest possible degree of happiness. According to Smith, the guide that directs to the good and happiness of individuals is "sympathy". In the etymological sense of "similar feeling" since it is with it that individuals are able to disapprove or approve of one's conduct on the basis of whether or not others sympathize with them (today we would say, share): individuals are spectators of their own actions just like all other spectators. Individuals, in judging their own behaviour, help themselves with a process similar to translation: they become a sort of "impartial spectator", not directly involved and detached. This "impartial spectator" allows individuals to carry out a mediation process between the satisfaction of their own needs and being accepted by the group, favouring actions useful to the community. Individuals, in the reality of daily life, tend to approve behaviours that they themselves would implement, while they oppose behaviours that are different from their own will and/or instincts.

If the Enlightenment brings individuals back to reason, Rousseau brings human reason back to nature. This produces the same result, since in the two cases the relationship between the "natural individual" and the "artificial individual" arising from social constraints as clarified by Rousseau (2014) is called into question. In contrast to the Hobbesian *Homo homini lupus* (state of nature), Rousseau's state of nature is founded on the harmony between nature and man: the moment the individual satisfies his basic needs, he develops compassion towards other human beings. In nature there is no ownership or oppression, but increasingly structured forms of social organisation have developed (mainly due to the property), civil society emerged slowly, based on the differentiation "mine" and "yours" (specification of inequalities). Thereby, humanity would definitively emerge from its natural conditions to structure itself in a constrictive organisation based on inequalities.

The centrality of reason with Romanticism takes on a new guise that differs from the centrality it had had in the Enlightenment: reason is understood as that "infinite" energy that dominates and inhabits the world, and which was understood as freedom, the ability to create and consciousness. This tendency of Romanticism to identify the infinite and the finite, and think of the latter as the progressive realisation of the infinite, is placed by Positivism in science. In this historical phase, science is the only legitimate expression of the infinite, charging it with a religious significance that replaces - as a new faith - traditional faiths. And it is within the evolutionist current of Positivism that "solidarity being" undergoes new transformations. Darwin's theory of evolution (1859), in fact, argues that all animal species are the result of differentiated evolution through the process of natural selection within common strains, in which only those

species survive that gradually adapt to changes in the environment. At the same time, Spencer's theory of social evolution (1898) states that society (superorganic reality) develops through various stages that emerge from evolutionary selection and not only from the progress of knowledge. Spencer's attempt is to elaborate an evolutionist theory applicable to the natural world (*inorganic evolution*) and the social world (*superorganic evolution*) because there are similarities between the social organism and the individual organism. Both, with the passage of time, modify and increase their structure, becoming more complex. Their interdependence, moreover, strengthens and survives until the death of each of their components. This form of social evolution, however, must be accompanied by principles of law, politics (understood as a means for the realisation of individuality and the will of citizens) and economics with liberalism.

While in France, with the spread of reformist socialist thought, "solidarism" (Bourgeois, 1896) spreads, which attempts to give a legal basis to solidarity, an interesting if somewhat banal response to evolutionism is offered by Kropotkin (1902), who considers cooperation as much a determining factor in natural selection as competition:

it is not love and not even sympathy upon which Society is based in mankind. It is the conscience – be it only at the stage of an instinct – of human solidarity. It is the unconscious recognition of the force that is borrowed by each man from the practice of mutual aid; of the close dependency of every one's happiness upon the happiness of all; and of the sense of justice, or equity, which brings the individual to consider the rights of every other individual as equal to his own. Upon this broad and necessary foundation, the still higher moral feelings are developed (Kropotkin 1902, pp. 12-13).

This is the historical moment when solidarity abandons its normative dimension to take on one of a political nature, and with the affirmation of *Homo oeconomicus* in the post-World War II era, the need to return to the concept of solidarity is increasingly pressing. Blais (2007) argues in her book that the term solidarity has invaded public discourse (both by right-wing and left-wing parties), the fact remains that what has been sanctioned by institutions often remains a theoretical and not a practical exercise, especially in the wake of the decades-long crisis of welfare state systems that has been going on for decades, and given the disastrous outcomes of the health emergency, this is also the case in countries with proven welfare systems. In more recent times, a further attempt at overcoming the utilitarianism of *Homo oeconomicus* in favour of the affirmation of *Homo socius* has been made with a modern reading of Marcell Mauss's study on the gift (Mauss, 1925) by some French scholars who constituted the *Mouvement Anti-utilitariste dans les Sciences Sociales* (MAUSS) [Anti-utilitarian Movement in the Social Sciences]: the gift is the means that promotes sociality since individuals are not content to reproduce and live in society, but produce it in order to live (Mangone, 2020).

These more or less successful attempts at proposing a new idea of solidarity have matured because the competitive approach that characterises development processes has supplanted the idea of solidarity as an action to fulfil inalienable duties, replacing it with a widespread contractualism, not only in the logic of *do ut des*, but also in the sense that whoever possesses more contractual power has a greater possibility of relating to others from a position of dominance, thus unequalising the relationship. The reinforcement of this condition is determined by the fact that relationships become increasingly dual in nature, excluding the other (the third party) and, therefore, moving further and further away from the dimension of "us", the

only dimension that makes it possible to exit or, at least, reduce insecurity and precariousness. And this occurs in spite of the fact that in 2000, with its proclamation, the Charter of Fundamental Rights of the European Union devoted the entire Chapter IV to solidarity. This principle, in fact, has been disregarded by many and in many places despite the indication in the Preamble that, Conscious of its spiritual and moral heritage, the Union is founded on the indivisible, universal values of human dignity, freedom, equality and solidarity; [...] The Union contributes to the preservation and to the development of these common values while respecting the diversity of the cultures and traditions of the peoples of Europe (European Commission, 2000, p. 8).

A new orientation towards solidarity is also difficult because of the increase in individual rights: everything today risks being legitimised as a right, including particular needs, desires and expectations. It is therefore necessary, on the part of politics, which is responsible for the “synthesis” between the different drives, to activate a filter and a fair prioritisation of the claims of the different subjectivities (collective and individual). For this to be achieved, it is imperative to strengthen all actions aimed at ensuring that all individuals have a ‘participatory citizenship’ to guarantee the concreteness of the possibility of feeling and being subjects through their own individual or collective life project: individualist self-referentiality must be replaced by a “collective existentialism” (Honneth, 1996). The new idea of social solidarity must, therefore, be understood not as the subjective attitude oriented towards a voluntary form of mutual aid, but as the irreducible need of every society that wants to base its existence on a set of values and rules shared by the members of the society itself, so as to minimise the threats that jeopardise its unity.

The Italian sociologist Franco Crespi, picking up on Honneth’s concept of “collective existentialism”, states that defining universalist rules tending to guarantee legal autonomy for all constitutes

the basis of a relatively homogeneous image of social identity understood as generalised *similarity* (identity *idem*) predominantly based on law, with the consequent attenuation of conflict between different social identities. However, we must also move towards possibilities of recognising singularity (identity *ipse*), opening up a space for *egalitarian difference*, i.e. towards the conception of solidarity between *different* (Crespi, 2004, p. 102).

This examination, which is certainly not exhaustive, has sought to highlight the “innovation” aspects, but also the “critical nodes” that accompany the concept of “social solidarity” - so qualified by the writer. No matter how many efforts are made to succeed in defining it, in some respects it remains elusive because it is simultaneously an idea, a value and also a principle. Overcoming, however, these dialectical aspects, in the remainder of this contribution I will put this concept in the “spotlight” both from a methodological and an epistemological perspective by correlating it with the scientific knowledge of sociology (and social sciences in general), insofar as these can take on a leading role (Bauman, 2004) of fundamental importance in imagining a different society that goes beyond the nation-state and is realised in the form of social solidarity and cooperation.

## Epistemology for the study of social solidarity

The debate on what constitutes scientific knowledge is not the objective of this paper, however, it becomes relevant to clarify, precisely on the basis of the assumptions of the so-called “strong programme” that spread at the beginning of the 1980s (Bloor, 1991; Barnes & Bloor, 1982) and the changes that are rapidly taking place, how sociology, or rather sociological knowledge, is a privileged tool for interpreting social transformations. However, the history of sociology - like the history of the humanities and social sciences - narrates of a development of these sciences with a lack of studies on the positive aspects of everyday life (love, solidarity, altruism, cooperation, gratitude, etc.). This is especially true for young sociologists: “In the twentieth century, the social sciences and the humanities – especially sociology and psychology – have adopted a ‘negativistic’ approach, i.e., a *modus operandi* that tends to bring out only negative or pathological phenomena without ever highlighting positive and healthy ones” (Mangone & Dolgov, 2020, p. 6). The justification for this position can be traced back to the fact that these processes are generally not considered negative (a problematic aspect) for society but as a regular aspect of social and human affairs. These sciences, since their origin, have in fact assumed a way of doing research that is oriented towards bringing out exclusively pathological or negative sociocultural phenomena and not healthy and positive phenomena, as Sorokin argued many years ago: “In the sensate social sciences this concentration on pathological has manifested itself in several ways. One of these is a proliferation of various ‘debunking’ of interpretations of man, culture, and value: mechanistic, reflexological, biological, materialistic, organismic, endocrinological, behavioristic, etc. These interpretations have deprived man and his culture and value of everything divine, spiritual, supermaterialist, or human” (Sorokin, 1950, p. 3). Furthermore, these sciences often overlooked the significant relationships between the various elements that give rise to and construct socio-cultural phenomena (society, culture, and personality) by turning towards the contrasts that the different societies presented (rich/poor, north/south, normal/pathological, centre/periphery, etc.). It is from the interactions between these that the complexity of *meaningful human interaction* processes and socio-cultural phenomena arise, and it is precisely the study of interactions that makes sociology (as a science) adept at pointing the way forward to improve the living conditions of human beings.

In the light of this, the “sociology debate around sociology” no longer tends to overcome the qualitative/quantitative *querelle* - taking for granted the integrated coexistence of the different methods - as much as the object of study of sociology, and the conjugation between empirics and theory. With regard to these aspects, if we try to conjugate the study of solidarity with sociology, we discover that the latter must assume such a perspective as to be able to overcome even the “two sociologies” that Becker had clarified in his book, *The Structure of Evil: An Essay on the Unification of the Science of Man* (1968), “One is the superordinate science of humanity which calls us to action and to change the world. It is an ideal science concerned with not just ‘what is’ but what ‘ought to be.’ The postmodernists have re-taught us that any version of ‘what is’ contains its own recommendation of ‘what ought to be.’ [...] The second sociology is the narrow academic discipline content to color within the lines and seek only journal articles, research grants, and tenure.” (Du Bois & Wright, 2002, p. 6). What Becker called “Science of Man” was not to separate “facts” from “values” and had “as its primary task that of changing society, so that it [becomes] a product of human freedom rather than of blind necessity [...] a program for analyzing and remedying the evils that befall man in society” (Becker, 1968, pp. 30-31). What

Becker envisaged was “that sociologists no longer imagine that it suffices ‘to do’ science; that in order to have a science of man, they need only work piling up data (facts), and trying to ‘tease out’ (horrid positivist word) social laws for eventual use... they cannot shun an active option for man as an end. If they continue to do so, they will not have any science” (pp. 367- 68). Sociology that studies solidarity represents Becker’s idea of “a superordinate science in the service of humanity. To say it is a superordinate science means that it synthesizes the disciplines and then uses that synthesis to forge a shared agreement about how to create a better world” (Du Bois & Wright, 2002, p. 5) using scientific methods, techniques, and instruments. From a methodological and epistemological viewpoint, sociology, as a science that studies the human being in the course of everyday life, should lead to the new discovery of the positive aspects of being human, and this is why it can also be considered a “guide” (Bauman, 2004), as it is not based on positivistic models of knowledge in the strict sense.

This becomes relevant if we consider the fact that sociology seems to be a science that often demonstrates difficulties in interpreting sociocultural change. In other words, sociology has difficulty in exercising that predictive capacity that Homans (1967) had attributed to it, due to its very marked self-referentiality or “sociologism” this ensures that it absolves the knowledge acquired on a phenomenon by limiting it to its own reference paradigms and approaches. Sociology, in an ever-changing society, could assume a leading role precisely because it studies the interactions between individuals and society in its various forms. In this way we remain closed within the boundaries of the individual disciplines (for problems related to the career and evaluation of individual researchers, or for reasons of scientific autonomy) with the result of obtaining only self-referentiality and a total or partial lack of redefinition of methodologies and methods, as well as paradigms. That is why, in writing this contribution, I have followed the line proposed by Polanyi, which suggests the return to the “*intellectual passion*” (active cognitive process that connects responsibility and science, reality, and beauty) because “Any process of enquiry unguided by intellectual passions would inevitably spread out into a desert of trivialities” (Polanyi, 1958, p. 143). And in the social sciences you cannot be trivial.

### **The metatheoretical approach to highlight the aspects of solidarity**

The epistemological debate has revived around “public sociology”, identified by Buroway (2005)<sup>1</sup> as that sociology which is based on a two-way, open discussion with all stakeholders involved. In reality, however, such discussion arises even earlier. One thinks, for instance, of another *presidential address* (Sorokin, 1965) in which the prognosis for “sick sociology” is the hope that the discipline for the future will move towards creative growth and enter a period of renaissance, or of the whole debate that arose around the book by Charles Wright Mills, *The Sociological Imagination* (1959). In the latter, he not only confirmed that one cannot understand society without understanding the lives of individuals and vice versa, but he also stated that individuals need a mind-set that helps them restructure information in order to

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<sup>1</sup> To this form of sociology, Buroway adds three others: *the professional* refers to the activities of academic sociologists (theoretical speculations and empirical research), *the critical* refers to the study of scientific knowledge systems and its implications and effects of change on society, and, finally, *the policy* refers to responses posed by third parties to direct an action or project following the results of commissioned empirical research.



develop reasoning that allows them to build a synthesis of what is happening to the world and what could happen to the individual.

It is desirable, therefore, that the knowledge of sociology (primarily) and social sciences (in general) become reflexive knowledge that promotes the construction of connections between subjects in their living environments, going beyond the “social physics” of Comtian memory to build the (theoretical and empirical) bases of interventions that can lead towards positive transformations both on a social and individual level that in turn can be translated into “knowing how to live”, as might be the case with the promotion of “solidarity”. The challenge of the ever-changing society that is moving towards globalisation determines, according to scholars, two orders of questions for sociology (Ossewaarde, 2007): on the one hand, the globalisation processes are seen as a threat to a new sociology and to citizenship; on the other hand, new possibilities are foreseen to return sociology to worldwide “public of non-experts”, by calling for a “reinvention” of sociology based on a “new sociological imagination” (Fuller, 2006; Solis-Gadea, 2005). In this way the social sciences and sociology, as well as the human sciences, must assume a fundamental role in establishing (in a first phase) and maintaining (in a subsequent phase) the integration of factors, disciplines and investigation methodologies.

Within the theoretical framework and method thus outlined, sociological knowledge - if it follows this method - assumes relevance for the construction of an effective and concrete scenario for the interpretation of social phenomena. The problem is being able to construct and maintain significant correlations between the autonomy of sociology from other sciences and the thought it develops: the factor that determines this type of problem is certainly of an epistemological order. In order to be able, therefore, to outline the aspects and elements that characterise the study and research on solidarity, it was essential to clarify the connexion existing between the development of sociological knowledge and the approaches followed to acquire such knowledge, by considering the epistemological and methodological aspects, through a metatheoretical approach (Ritzer, 1990, 1992) that is usually used for so-called second order studies.

The application of this type of approach was necessary because the sciences and in particular the social sciences have developed unevenly, both with regard to the internal development of the individual disciplines and the relationships between them. In *The Structure of Scientific Revolution* (Kuhn, 1962), it can be observed that sociology does not reach a high degree of consensus on what is to be understood by “theory”, how it is to be arrived at, and by what methods it is to be expressed and proven, and even what the objects of investigation are to be. In simpler words, sociology lacks what Kuhn calls a *paradigm*, i.e. a system of concepts that have whose function is to organise and direct research so that it is falsifiable and communicable within the scientific community. The poverty of paradigms, however, cannot be compared with a poverty of methods and theories available for sociological research; on the contrary, we are faced with an innumerable number of paradigms that are “potential” and none emerges over the other as hegemonic. In fact, the “weakness” of the paradigms, despite expectations, has given rise to a notable development of sociology; many sociologists have even drawn attention to the crisis of sociology, giving rise to that spiral process defined by many as the “sociology of sociology” (Morin, 1984). This condition has given rise to a new genre in sociological studies since the second half of the last century, the metatheory that “in its most empirical form, is nothing but sociology of sociology, which is itself a special branch of the sociology of science and knowledge”

(Fuchs, 1992, p. 532). The term metatheory identifies a meta-study that focuses on the examination of theories and theorizations. According to Zhao (2004), the emergence of metatheory in the sciences analysing society was the result of the failure of these sciences to discover general laws of the dynamics of society. This failure has led several scholars to look beyond questions of methodology to engage in metatheoretical reflections which according to Ritzer (1990) are of three types differentiated<sup>2</sup> on the basis of the nature and goals they set.

The need to apply this method to the study of solidarity and to what I define as social solidarity is inherent in the object of study itself which is not easy to read starting from its definition and practical declination. This allows for in-depth understanding of the theory inherent to the object of study necessary and to do this, in writing the following paragraph, all types of metatheorization identified by Ritzer were applied on theories and theorists who directly or indirectly referred to social solidarity. The attempt is to try to define a new theory through the creation of a global theoretical perspective (a metatheory) relating to social solidarity.

### **Dimensions of social solidarity: definitions and distinctions**

Usually when dealing with a concept, for a matter of logic and simplicity, we first provide the definition of the concept and then continue with the arguments, in this article we have gone a little in reverse as first a brief overview (also historical) of the idea of solidarity was presented, then critical nodes of both epistemology and method were highlighted relating to sociology and sociological knowledge and now, referring to metatheorisation, we will try to outline the dimensions of “social solidarity”, through definitions and distinctions, starting precisely from why we refer to social solidarity and not to other forms of solidarity which have also been declined in contemporary society.

The definitional problem linked to the concept of solidarity is clear as already stated by other scholars: “It can be argued that the concept of solidarity is extremely vague and indeterminate if used without qualification; without prefix or suffix that gives it a distinctive orientation” (Hayward, 1959, p. 261). For this reason, here I do not reflect on solidarity *sic et simpliciter*, but on “social solidarity” whose adjective “social” is not by chance a “historical qualification of solidarity” (Rodotà, 2014, p. 9). Obviously, there are many other qualifications of solidarity, some of them are given as examples. Recall the distinction made by Scholz (2008) makes between *political solidarity* (referring to responses to unjust or oppressive situations), *civic solidarity* (referring to the relationship between citizen and state bodies) and *social solidarity* (referring to the internal cohesion of the group); another example is *democratic solidarity* (Brunkhorst, 2007) which is flanking or even replacing social solidarity. To make the reader understand the reason for the choice to qualify solidarity as “social” - reason is not only inherent in my discipline (sociology) - not only will the noun (solidarity) be defined, but also its (social) adjective, and to do so I will start from the etymology of the two terms.

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<sup>2</sup> Ritzer clarifies and describes the three types of metatheorization as follows: “The first type, *metatheorizing as a means of attaining a deeper understanding of theory* (M<sub>U</sub>), involves the study of theory in order to produce a better, more profound understanding of extant theory [...]. M<sub>U</sub> is concerned, more specifically, with the study of theories, theorists, communities of theorists, as well as the larger intellectual and social contexts of theories and theorists. The second type, *metatheorizing as a prelude to theory development* (M<sub>P</sub>), entails the study of extant theory in order to produce new sociological theory [...]. There is still a third type, *metatheorizing as a source of perspectives that overarch sociological theory* (M<sub>O</sub>), in which the study of theory is oriented to the goal of producing a perspective, one could say a metatheory, that overarches some part or all of sociological theory” (1990, p. 4).

Many derive the term “solidarity” from the French *solidarité* - the language in which the term was spread - but in reality it derives from Latin and precisely from the rule of Roman law called “*obligatio in solidum*” which indicates the obligation of multiple debtors towards the same service; this obligation means that each of the obligors can be forced to comply, freeing the others from the obligation (regulatory dimension). This is also the meaning that the term retained for a long time in its transformation into the French language, so much so that it was also found in the *Encyclopédie* of Diderot and d’Alembert of 1756 and in the Napoleonic Civil Code (Laitinen & Pessi, 2014). We will find the transition from the “regulatory dimension” to the “political dimension” only a few decades after the French Revolution, a historical moment which also establishes the spread of the term beyond the borders of France as it was adopted in particular by workers’ movements in England and Germany.

The term “social” also derives from the Latin *socius* which refers to the life of man as a member of a community in which he has, or at least should have, a substantial right of equality with other members. In fact, one of the masters of sociological thought like Sorokin (1922) identifies *homo socius* as the object of study par excellence of sociology and as the only form of human being capable of promoting the balanced development of society. *Homo socius* identifies himself/herself as a human being who, in his generic nature, is characterized simultaneously by an interdependence and mutual influence with the sociocultural universe (multiple reality).

Up to this point, the adjective associated with the term solidarity appears clearer as it designates the ability of the members of a community to act towards others as a single subject, therefore, it emerges that solidarity concerns the relationships of the members of a society (considered a single subject) towards others. Two fundamental elements for the continuation of this work and closely related to each other can be deduced from this aspect just outlined: solidarity presupposes the existence of some form of relationship, and this leads to the affirmation that solidarity can no longer be conceived, as probably done up to now, only as a macrosocial phenomenon (group integration and cohesion) or as a microsocial phenomenon (attitudes and emotions), but must be conceived in its dimension of a meso-social phenomenon and, that is, of phenomenon related to the relationships between the life world of the members of society (set of representations and meanings) and the social system. Having said that, I agree with the statement that, “solidarity” is one crucial but not all-encompassing or all explaining reality and concept. ‘Solidarity’ is one basic and ineliminable mode of social relations, operating among a few other important such modes of relations” (Smith & Sorrell, 2014, pp. 219-220).

This statement highlights that solidarity is a form of social relationship and to be more precise, recalling the relationship models<sup>3</sup> (Fiske, 1991, 1992) that individuals use to interpret and define a situation, social solidarity can fall within that form of relationship that the American anthropologist Fiske calls “*communal sharing*” because,

In the context of a Communal Sharing relationship, people treat material objects as things that they have in common. [...] People simply take what they need and contribute what they can, without anyone attending to how much each person contributes or receives. A person does not need to give something in order to get something in return—simple membership in the group is sufficient to entitle one to the use of whatever resources the

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<sup>3</sup> Fiske, in addition to “*communal sharing*”, identifies three other relationship models: “*authority ranking*” in which there is a differentiation in the appropriation of objects, “*equality matching*” which emphasizes equality of value between individuals, and “*market pricing*” which is essentially based on rational cost-benefit choice.

group controls, and long-run imbalance is not a violation of the relationship. But each person has the complementary obligation to share with other members who need or ask for things (Fiske, 1992, p. 693).

In a context of community sharing, therefore, individuals in a certain way lose the sense of their individual boundary to assume one of unity and belonging and identify with the community: they think they are equal to others in some aspect considered significant. We are no longer considered individuals but as an “us”. That “us” of Moscovici’s (2000) participatory altruism that binds members of a community, society or group and is thus that “we” for which individuals are prepared to sacrifice themselves. In this case, solidarity can sustain those ties that cannot be broken for the survival of the group to which one belongs. This happens regardless of the form the group takes. It is not, however, an “us” that pushes towards the “us” / “them” distinction and closure - in the sense of Touraine’s communitarianism (1995) - but it is an “us” of openness that is strengthened and unfolds positively because the individual does not set himself up to “defend his own world” but to “defend our world” (Mangone, 2022). This position leads us to a further distinction to make. Social solidarity is often confused with the concept of fraternity (Francis, 2020; Morin 2019) which in turn is distinguished from brotherhood<sup>4</sup>. There is nothing more wrong than this consideration regarding the concepts of solidarity and brotherhood. The principle of fraternity, typical of Christian culture and of the Rule of Francis, is based on a common paternity (God) or a feeling of common maternity (mother earth) and would therefore allow the simultaneous presence of both equality and singularity of individuals. This, in turn, would allow the latter to express themselves differently on the level of individual lives. In complex modern societies the principle of fraternity is not applicable because it does not consider the interpersonal logic which nevertheless characterizes the forms and methods of social solidarity.

Recalling Touraine (2000), who has always practiced critical sociology, solidarity becomes a social duty so that all individuals can see their right to give meaning to their existence applied. This right imposes on everyone a duty of solidarity, which is not imposed, however, as an instrument of social integration or civil peace, but as a means of giving everyone autonomy and security, allowing them to act according to their own values and projects. What Touraine claims is, in other words, also what May (1996) had stated earlier, namely the centrality of identification with a group and the idea that the well-being of the group is part of the well-being of each member, and this constitutes solidarity. Solidarity arises, therefore according to May, only if certain factors are present which he identifies as: 1) conscious identification with the group; 2) sentimental ties; 3) interest shown in the group’s well-being; 4) shared beliefs and values; and 5) willingness to show moral support. From this it follows that solidarity develops from common and shared interests and is felt or expressed by individuals who see their destinies linked by something that they consider significant for their lives (common destiny).

Wanting to give a definition of social solidarity as close as possible to what has been argued so far and also clear from a sociological point of view, I can state that social solidarity consists of that set of values and/or rules sufficiently shared and consequently accepted by the members of different societies which allows the coordination of their actions (social order) for a

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<sup>4</sup> Brotherhood is a concept that is linked to the belonging of individuals, we are brothers because we belong to the same species or to the same community of destiny, in other words brotherhood makes us “partners” in certain interests.

shared, common and co-responsible experience towards the common goods of that specific community (Torres Hernández, 2022). Social solidarity, in summary, appears to be characterized by three fundamental dimensions: *identification*, *belonging* and *responsibility*. Regarding the first dimension (*identification*), it is well known among experts that identification processes are not possible without recognition and sharing of experiences lived in common with others within different social environments and this leads to the second dimension (*belonging*) which, given the rapid transformations of contemporary society, undergoes changes producing a tension between the group and the individual. This takes the form, on the one hand of the limitation of the individual's actions as they belong to a group; on the other hand, it gives role and identity to the individual himself. These two dimensions are, therefore, closely linked to each other, however, for solidarity to be active they are not sufficient. In fact, the third dimension (*responsibility*) is necessary, which takes the form of a collective responsibility towards the other members of the community of which they are part. This clarifies once again why the adjective "social" was preferred to qualify solidarity. The latter is not, in fact, based on representation in social action but constitutes an assumption on a collective basis which is always also co-responsibility. In fact, it is a choice that arises from within the community and, therefore, from society, it is not an imposition by the institution or externally.

This last dimension shifts the level of meaning of solidarity, going beyond some aspects that were always attributed to it - for example, organicity, charity, sharing of ideals or interests and, finally, justice or equity - to take on the meaning of "co-responsibility". In this way, the ethical foundation of actions becomes the principle of responsibility (Jonas, 1984), which aims to preserve both man's being and his life (in the psychological, social and physical sense) and the wholeness of his world for future, as it is far from both hyper-subjectivism and objectivism: we seek intercultural and intersubjective values that help dialogue between opposing positions - although present in a society - orienting them towards the common good. "Co-responsibility" would guarantee the common good, since the real problem lies in the fact that all moral rules have some exceptions, so the need arises to identify the overriding one among the conflicting rules. With "co-responsibility" we would also overcome the contrast between the Kantian principle "Act in such a way as to treat humanity, both in your own person and in that of everyone else, always also as an end and never simply as a means" Bentham's utilitarian principle of "greatest happiness for the greatest number". In modern society, however, responsibility for choices has been delegated to law in the form of a simple procedure. Instead, abandoning the jurisprudential and even ethical aspects, the matter of solidarity could be put in terms of the conflict between social responsibilities and individual freedoms, but it is obvious that the discussions around this conflict are influenced by both the cultural context of reference and the disciplines that deal with it. Weber (Lassman & Speirs, 1994; Lassman, Velody & Martins, 1989) had interpreted this aspect well by stating that the diversity of values presents itself in the form of duality between *Gesinnungsethik* (the ethics of principles, also called beliefs or intentions) and the *Verantwortungsethik* (ethics of responsibility). The first refers to principles in the absolute sense, which are assumed independently of consequences to which they lead (for example, the ethical principles of religion); the second, on the other hand, refers to cases where attention is paid to the consequences of the action and the relationship between "goals" and "means". In summary, being "co-responsible" means that each individual - even beyond the proximity of time and space - must take responsibility for the consequences of his or her actions towards himself or herself

and others. Human action, in its broadest sense, and “social solidarity”, in its specificity, must be understood and accepted as the most suitable form of acting towards oneself and towards others (considering situations experienced in a differentiated way) and represents the mirror of relevant elements that are found within the social context in which situations are experienced.

## Conclusions

In light of this attempt to outline the main dimensions of social solidarity - highlighting definitions and distinctions - some summary elements can be drawn while being aware that the discussion does not end. On the contrary, with these points that will be made explicit we really want to underline that the debate is open and remains totally open.

The processes of globalization with the consequent abandonment of the Fordist model, the growing sense of insecurity and technological development have had a great influence on the world: the life path of an individual changes several times during the life cycle, adapting the times of the latter to the contingent needs. These transformation processes have inevitably also been reproduced in society, causing the following changes in particular to be recorded which deserve to be considered when studying social solidarity: a) the modification of risk maps (increase in poverty, marginalization, exclusion, vulnerability, etc.) which leads to the request for new interventions by differentiating demand on the basis of the new system of needs; b) the emergence of the dimension of relationality as an area of social hardship (and this appears even more serious after the health emergency attributable to SARS-CoV-2 virus); c) the relativization of knowledge which is often called into question by the information provided by the mass media, resulting in an erosion of trust in the sources of information themselves; and, finally, d) the non-linear development of social dynamics and technological transformations, which make it mandatory to update, innovate and modify knowledge to face society's continuous challenges. The transformation of the situations that an individual lives in his daily life within different cultural contexts allows the construction and consolidation of the individual and social identity of each member of society through processes of identification and differentiation. From these processes derive cultures and identities which are to be considered critical variables because they are characterized by an intrinsic force that can initiate transformations or attempts at transformation within the relationship between society and individuals.

From this the question forcefully emerges whether today it is still possible to act oriented by the *humanitarian ethos* instead of instrumental rationality, or whether a new orientation is possible that manages to combine the motivations on which actions and self are based. - and hetero-interaction and the perception of the same. “Doing” (participation) and “being” (subject) are both expressed in relationality and since the latter is influenced by the social condition and above all by the culture that characterizes it, it is inevitable that the more or less solidaristic attitudes assumed by individuals are in turn influenced by these (Mangone, 2022). In light of this I can argue that: a) socialization to the culture of reference can favor or not favor different forms of solidarity actions; b) the identities of individuals, characterized by “doing” and “being”, are constructed through a process of identity negotiation. The latter, combining these two aspects, promotes actions of social solidarity characterized by a high degree of participation and by the conjugation of aspects linked to the individual, thus expressing his will to act by becoming a “subject” (Touraine, 1995) and, therefore, recognized “actor”.

The key point is that the solidarity relationship is very complex and is located in a network of significant interactions within the relationship between individuals and society, and between individuals with continuous changes in each of their elements. Too often we think of social solidarity as a relationship characterized by asymmetry - the latter plays a fundamental role in building the trust that is the basis of every solidarity action - in reality, the differences between “giver” and “receiver” are due to identity and cultural-building elements not typical of the relationship (Mangone, 2019). But, wanting to try to draw a sort of final statement, I can say that I agree with what Žižek (2020) argued, according to which if we want to even remotely imagine a future in which all of humanity can be infected by the “global solidarity and cooperation”, some critical issues – not to mention paradoxes – of contemporary society must be resolved. The biggest problem to be faced in current society is not to return to that pseudo “normality” that existed before the pandemic emergency, but it will be to redesign a new economic order such that - in the event of a new future pandemic scenario (now not too imaginary) - we no longer have to choose between relaunching the economy and saving human lives.

In conclusion, it should be noted that this article, which attempts to define a new theory on social solidarity through a global theoretical perspective (a meta-theory, to recall Ritzer), is limited by the residual number of theoretical studies that have conceptualized social solidarity (with the exception of a few classic studies such as Durkheim’s), which does not allow for a total generalisation of what I propose to different societies, without prejudice to the points highlighted above that cannot be left out in a study on social solidarity and this regardless of the type of society.

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