

INTERNATIONAL POPULATION CONFERENCE

FLORENCE 1985

CONGRES INTERNATIONAL DE LA POPULATION

VOLUME 1

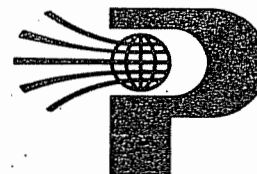
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**international
population
conference**

FLORENCE 1985

5-12 June
juin

**congrès
international
de la population**



international union
for the scientific study
of population

union internationale
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de la population

TRIBUTE TO GIORGIO MORTARA
HOMMAGE A GIORGIO MORTARA

Address by Paolo BAFFI, Honorary Governor of the Banca d'Italia
Address by Alberto MORTARA

Tribute to Giorgio Mortara

Address by Paolo BAFFI
Honorary Governor of the Banca d'Italia
Rome, Italy

The President of the Society of Italian Economists, Professor Fuà, wishes me to express his regrets at not being able to attend this closing session and the celebration of Giorgio Mortara. I am representing the Society in my capacity as Vice-President.

Madam Chairman, Ladies and Gentlemen,

Each one of you on arriving here today was presented with a small book on the life and work of Giorgio Mortara. The book, in Italian and English, is intended as a tribute to this distinguished demographer and former chairman of your International Union, on the occasion of the hundredth anniversary of his birth. It is edited by the Faculty of Statistics of Rome University, where Mortara taught in the late fifties, when he was approaching the end of his career.

A foreword written by the Faculty Dean, Antonio Golini, together with Eugenio Sonnino, and by Nora Federici, gives a short assessment of Mortara's scientific work. It is followed by Mortara's autobiography, which he wrote in 1963, four years before his death, and which with the consent of his family is now published for the first time, although not in full.

At the invitation of Professors Golini and Livi-Bacci, I proceeded to select the parts to be published. The self-imposed guidelines I followed in so doing were to cut to the bone the ones dealing with Mortara's family life and to preserve *in integro* those in which he tells of his education, the professional and political choices he made in life and their underlying motivations, and his academic and scientific activity. As a result, the original text has been halved, but without a single change in the wording. I have also taken great pains to secure that the chosen parts, when brought together, would form a consistent whole.

The autobiography is followed by an annotated bibliography, which testifies to the amazing volume of Mortara's scientific production, stretching

over six decades. It includes more than four hundred titles. In an addendum to the book dealing with Mortara's demographic work in Brazil, Elsa Berquo mentions a former bibliography containing no less than 973 titles.

Mortara's father had been himself a renowned scholar, who, when the Fascist party came to power in 1922, was President of the Italian Supreme Court of Appeals. His firm and impartial application of the law caused the Fascist government promptly to demote him and to keep him on the fringe for the rest of his life.

Apparently, Mortara did not take his father's fate as a serious warning of what might befall him, although he sometimes half-jokingly hinted at the risk he was running of being one day relegated to a small island to take a forced rest. In objective terms, he was less exposed than his father, who had been a Minister of Justice in one of the last pre-Fascist governments. Mortara himself had never been active in politics. His public assessments of Fascist politics were guarded ones, not out of fear, but because, like so many other high-minded people at the time, he regarded with favour the restoration of some discipline in the life of the nation, and hoped that political freedom would be re-established. In a letter in 1928 to De Stefani, himself a professional economist and a former Fascist Minister of the Treasury, he wrote: "If God grants me the length of life decreed by the survival tables, I believe and hope that I shall see freedom restored and the general interest reconciled with respect for the dignity of the individual. Then only will real harmony in national life be attained, on a foundation of equality for all citizens before the law".

This ideal model of society, in which freedom and discipline coexist, also inspired his economic thinking. He was confident in the ability of the market to adjust to changing patterns and volumes of demand, but thought that the play of market forces, as governed by the individual decisions of households, firms and organized social groups, needed some guidance for the general interest to be served. On the external front, he was keenly aware of the high degree in which Italy was dependent, in peace and war, on imported supplies, and advocated that it should be decreased.

His stance was not characterized so much by the position he took on the issue of *laissez faire* versus *planning*, as by the method he suggested for the framing of policies. He insisted that the answer to each specific problem should be sought pragmatically, to the largest possible extent through the collection and sifting of empirical evidence.

As far back as 1923, writing in a daily paper on Italy's foreign trade, he stated:

"A civilized country should know how it pays for its imports. A Minister of the Treasury, a central bank governor, the manager of a large commercial bank, who do not possess information on such a matter, are helmsmen without a compass in the stormy sea of the foreign exchange market. Unbelievable as it may seem, this is the case we are in".

And again:

"The decay of official statistics has translated itself into a lack of information on the state of the country which is frightening for those who realize how very important it is to know in order to act correctly".

He continued to the end of his life to emphasize this need, as shown by a striking quotation from one of his last writings which is included in the paper by Elsa Berquo.

Such were the ideas he professed when I, still in my teens, started working with him in 1930. I followed his lessons and took notes that he revised for circulation among the students.

His methodological approach to the analysis of policy issues is illustrated by a memorandum he submitted in that year to the Gold Delegation of the League of Nations, who had asked his advice on the influence of price changes.

During his youth, he had done pioneering work in the building of what he called "synthetic indexes of growth", which was much in advance of the spread of comprehensive estimates of national income. In his answer to the League, he compared the movements in his own growth indexes for the four main industrial countries and Italy, with those of prices over the half century before and after the discovery of the gold mines in the Rand, showing that a slow and prolonged price decline had not adversely affected growth. The policy inference in this case was that the adjustment to changes in the supply of gold could safely be left to the operation of a flexible price system.

Mortara was at the time a fairly happy man. He taught economics and statistics in the two main Milan universities; he was editor in chief of our leading social sciences review, the *Giornale degli Economisti e rivista di statistica*; he was a honorary fellow of the French and British statistical societies. He was considered by the profession to be second only to Gini as a theoretical statistician, but as having the advantage over him of a wider range of scientific interests. He had served with distinction during the First World War as an officer attached to the High Command of the Italian Army, and had produced statistics on the strength of battle units and the state of equipment and supplies which had helped the chiefs of staff to reorganize our land forces after the severe defeat they had suffered in the autumn of 1917 and to bring them to final victory a year later.

Since 1921, he had been issuing an economic and statistical Yearbook, the *Prospettive economiche*, which he continued to 1937. The descriptions of current trends and the forecasts it contained were not ignored by the business community; by managers of industry when assessing the market outlook for their products, by commercial bankers when evaluating the credit worthiness of individual branches of industry and firms. The text of his yearbook was more readable than the dry tables of the official one, a fact which, by the way, further increased the competition with Gini, who at the time presided over the Central Statistical Office.

In 1936 a new Banking Law was passed, and the central bank invited Mortara to help reorganize its Research department and to establish new banking statistics. Meetings of top commercial bankers were convened in which once again Mortara, while accepting in principle the regulation of credit flows, vigorously advocated that it should be based on adequate, up-to-date statistical surveys.

When seen in the light of social and economic developments in Italy since the Second World War, his ideas would seem to me to have reacquired

some of the relevance they had apparently lost during the fifties and early sixties. Growth was then associated with monetary stability and social peace. Since the late sixties, the confrontation between social groups has hardened, the pace of growth has become slow and uneven; the country has suffered from inflation rates unprecedented in peacetime.

There is no denying the fact that pervasive government intervention, inclusive of government ownership, has failed, and that the economic system is burdened with a number of structural rigidities which account, at least in part, for the poor economic performance of Italy, as well as of other Western European countries, in recent years, and which need to be removed.

But, on the other hand, two oil shocks have shown the danger of excessive dependence on imported basic supplies. And a number of impressive market failures has come to the fore. Never in the past has so much attention been given by economists to the problems of externalities, overshooting, free riding, speculative bubbles, self-fulfilling expectations, volatile interest rates and exchange rates. Freely floating exchange rates have been associated with large, destabilizing swings in real exchange rates and a policy of "benign neglect" has allowed a monstrous current account deficit to develop in the United States balance of payments, bringing about abnormal capital flows. This wealth of newly acquired experience is now available to rethink and redefine the optimal distribution of roles between government and the market.

In the field of population (if I may be allowed to tread on your own ground for a short moment) I have been impressed with recent statements by Mr. Clausen, the President of the World Bank, who characterizes the situation in the high fertility areas as one of stalemate, in which population growth blocks an economic take-off, and economic stagnation blocks a decline in the birth rate. We have here a most ominous case in which individual decisions fail to add up to the common good; and one that needs a great deal of educational, organizational and financial effort by national governments and the international community.

In the late thirties, the plague of racial policies, which were entirely foreign to Italian culture, spread to Italy. Mortara believed - to use the words of his memoirs - that "That sort of thing could never happen in Italy". But it did happen, and in 1938 he was obliged to resign from University teaching, was expelled from all Italian scientific associations, and his children were denied state education. If you care to take a look at page 37 of the book, you will find, in a facsimile of his neatly handwritten text, a moving account of this moment of crisis. The English translation appears in print in the upper part of page 83.

His decision to emigrate was mainly prompted by concern for the future of his four children. At the age of 54, he was called upon to make a number of painful adjustments. He had to abandon his country, his brother and sisters, his home, his books and other property; he had to learn a new language in spite of the impediment of deafness; he had to accept a much lower standard of living for his family in a new environment.

A second crisis followed in 1942 when, as a result of Brazil joining the Allies, he found that he had become an enemy alien. In his memoirs, he glosses over the vexations he and his dear ones had to endure as a result of being put in such a cruel and grotesque situation. He was a kind and considerate man, and his silence can be interpreted as a recognition of the overall debt of gratitude

that he felt he owed Brazil. But a book, similar in purpose and structure to the one you have just received, which has been published by the Instituto Brasileiro de Geografia e Estatística, includes a letter dated August of that year, in which he writes that Stephan Zweig and his wife had taken the only possible path to find justice. Zweig and his wife had just committed suicide in Petropolis.

The strength of his character and family bonds, together with his wife's fortitude, probably played the main rôle in determining his success, first in making the initial adjustment, thereafter in surviving the next crisis, but a few other factors are worth mentioning.

Firstly, the problem of making the best of existing data, of filling the gaps through conjecture, cross-checking and calculation was not novel to him. He had tackled it in Italy at the beginning of his career, as well as in producing statistics for the High Command under the confusing conditions of war. And the traits of Brazilian demography which he unveiled through this process often repeated those which characterized Italy as a whole (such as the high difference in fertility rates between less and more developed regions) or individual Italian regions. Of course, as he went South, the population problem that confronted him was reversed: from the nightmare of depopulation, about which he had first written in 1911, to that of the population explosion.

Secondly, he was used to working with little help. As an example, I can recall from personal experience how he proceeded in drafting the *Prospettive economiche*. The basic statistical information was drawn from a number of Italian and foreign sources, and such processing of the data as was required for bringing together the innumerable tables inserted in the yearbook was done with the help of just a small adding machine worked by hand.

Thirdly, the cultural affinities may be mentioned. Racism was foreign to Brazilian culture, as it had always been to ours before the servile adoption of antisemitic laws in 1938. Indeed, the tolerant, carefree attitudes and moods of the Cariocas were reminiscent of Naples, where he had lived in his youth and of which he had retained the fondest memories.

Lastly and most importantly, he sensed from the very inception of his work on the 1940 census the challenging nature of the task that stood before him - to advance the knowledge of the structure and movement of an immense dynamic population by applying proper methods of demographic analysis, part of which he had been among the first to develop, and by devising new ones as required by the limited amount and reliability of existing census information and vital statistics. Population was his beloved field of research, and the urge to improve statistical information was all along his life one of the driving forces of his activity. No task could have been more congenial to him than the one he was assigned. All these factors combined with his keen sense of professional duty to make his commitment a total one.

So that, when in 1945 he was invited to resume teaching in Italy, he declined the offer, which was repeated in 1956.

By this time, a second census had been taken since his arrival in Brazil and its results analysed, the general standards of Brazilian population statistics had been raised, and the technical staff trained. Mortara felt that his task had been accomplished, and accepted the new offer. He chose the Faculty that today pays tribute to him with the book I have mentioned. At his suggestion, an

Institute of Demography was established within the Faculty.

For the rest of his life, he divided himself between Italy and Brazil, but his heart and interests were, by now, mainly beyond the Ocean. Brazil's gain had been Italy's loss, a sad loss for us, but not an undeserved one. When he came to die in Rio, I wrote:

"For myself, who had worked with him with such fervour in my youth, there was a certain sadness in our encounters during his latter years. His country of adoption, in which initially, in order to survive spiritually, he had looked for something to recall his native country, had subsequently become the home of his children and their families and, with the wealth of material for experience and research that it offered him, the country of his dominant scientific attention. So that I sensed, in the rarity of these encounters and in the growing alienation of our spheres of interest, that those of us who had remained behind were also required to pay part of the price of a policy which had been cruel in inflicting so much sorrow, and perverse in depriving Italy of so many of its sons of steadfast conscience and high intellect".