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Population ageing and intergenerational solidarity

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Generations & Gender
Programme

*How generations and gender shape demographic change
Geneva, 14-16 May 2008*

Population ageing as a challenge to intergenerational solidarity

- Privately in the family: Will families be able to balance between older and younger generations?
- Publicly in society: Will societies be able to maintain the generational contract?
- Usually from the younger generation perspective:
 - Willing and able to support older parents?
 - Willingness to contribute to the common good via taxes, and to support redistribution?

Concern about family solidarity

- An old story
- Often some form of nostalgia: things were better before
- Blamed on modernity and individualism
- The welfare state as a 'moral risk'?

Concern about societal solidarity

- Increased in response to a welfare state containment policy?
- Responsibilities pushed back on the families?
- Identifications and loyalties reduced to a more narrow circle of people like oneself?

Two sides to the concern

- About ability: Change in population balance, more burdens on the younger generations?
- About motivations: Less obligated, more self-centered?
- ... but the older generation may represent resources as well as burdens

Mixed evidence, knowledge gaps

- For example ...
- Increased individualism a risk or a resource for solidarity?
- Family solidarity a risk or a resource for societal solidarity?
- These and other knowledge gaps are among the motivations for the Gender and Generation Study

Earlier studies 1

- Family solidarity
 - The family decline perspective:
 - a widely held popular belief that family ties grows weaker under modernity
 - Assumptions:
 - – self-interest will grow when given the opportunity,
 - – collective ties are burdens people want to escape
 - But clearly, there is more to families than obligations, and more to society than tax bills.
 - The family resilience perspective
 - Modern family still vital, and includes the older generation

Earlier studies 2

- **Societal solidarity**
 - Pessimists: less – and more narrow – identifications
 - Optimists: still strong popular support for the welfare state,
 - In particular for benefits to older people, who rank high on 'deservingness' and 'identification'
- **The family–society interaction**
 - Less research
 - Family solidarity a risk or a resource for societal solidarity?
 - Affection for grandparents generalize to older people more generally?
 - Low societal trust make people hide in the family?
 - Tight and protective families a risk for solidarity beyond the family?

Perspectives

- In context: Competing obligations:
 - Combining work and family commitments
 - Balancing between children and older parents
 - Balancing between self and others
- From both sides of the relationship:
 - from the younger looking up generations,
 - from the older looking down generations
- Ambivalences:
 - Between filial and parental concerns
 - Between autonomy and obligation

The many legs of solidarity

- Norms (duty)
- Affection (attachment)
- Needs and interdependency
- Mutual identifications
- Common history
- Reciprocity and social debt

- Some of these may be challenged by the demographic transition, others may possibly be strengthened?
- Thus we need to know more about the character of solidarity, and how it may take different forms under different contexts and conditions
- GGS may help us in this endeavour



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Public opinion about the family- welfare state balance

A comparative exploration

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Public opinion about how responsibilities should be balanced between family and society, and within the family – up and down generations

What people see as the right thing (ideals), not how they act (behaviours)

Why knowledge about ideals is important?

- tend to guide behaviours, and may help us understand how people will behave
- serve as information about the responsiveness of policy (the democratic argument)

The family-welfare state balance

- Welfare state studies
 - How welfare states differ not only in levels, but also in priorities and profiles
 - For example
 - Scandinavian model high on services
 - Germany high on transfers
 - Italy with priority to elders
 - France with priority to children
- Research questions:
 - How responsibilities for care and cash (financial security) to elders and children should be divided between the family and the welfare state
 - And within the welfare state, whether priority should be given to cash or care, elders or children

The inter-family balance

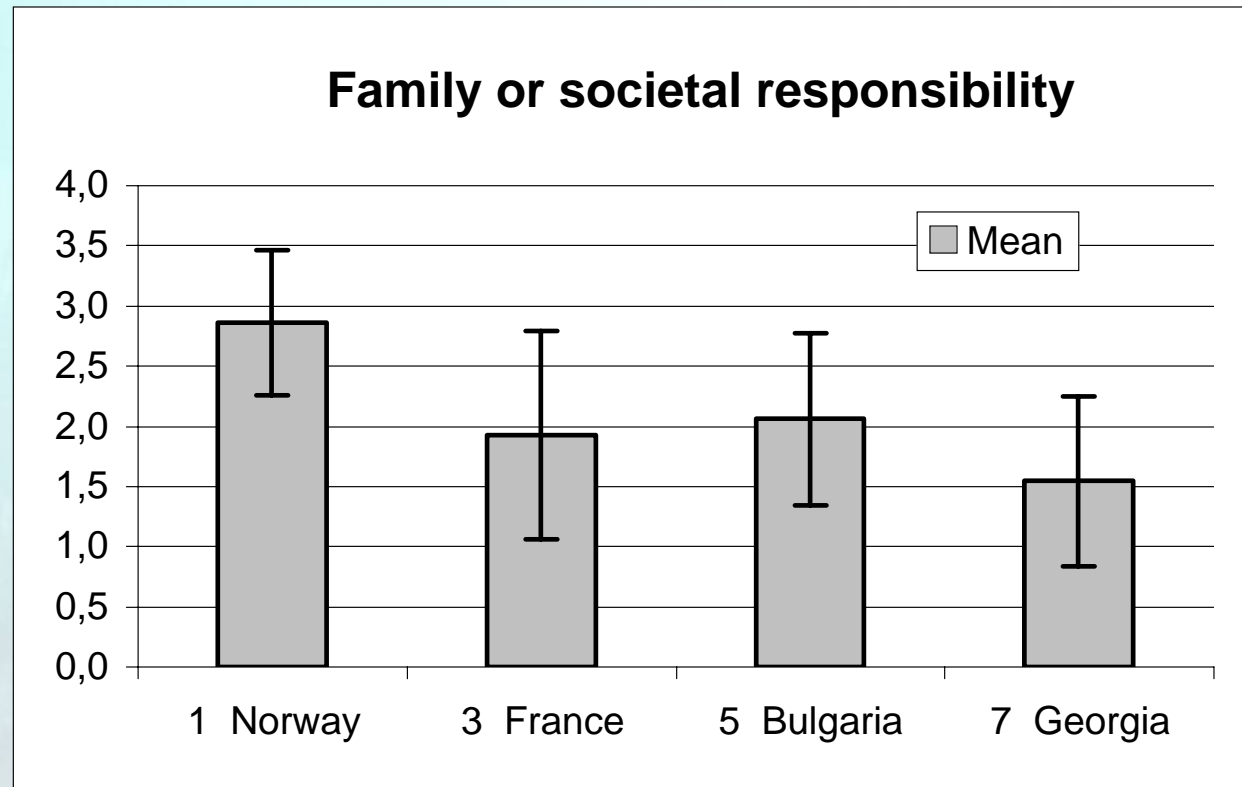
- Family solidarity studies, four theoretical positions
 - Intergenerational family solidarity paradigm
 - Priority up (elders)
 - Developmental stake hypothesis
 - Priority down (children)
 - Social exchange theory
 - Priorities balanced
 - Intergenerational ambivalence model
 - Priorities conditional

Questions and measurements

- Family–society responsibility: Please indicate for each topic whether you think it is mainly a task for society, the family or both?
 - Care for older people in need of home care
 - Care for pre-school children
 - Financial support for older people below subsistence level
 - Financial support for younger people with children below subsistence level(five response categories from totally family to totally society)
- Priorities up and down family generations are indicated by support for filial obligations (up generations) and parental obligations (down generations):
 - Parental obligations:
 - parents should adjust their lives in order to help children in need
 - Parents should help children financially when in need
 - Filial obligations:
 - Children should adjust their working life to the needs of their parents
 - Children should help parents financially when in need

Findings 1

Figure 1: Scores on the family–societal responsibility index by country.
0=total family responsibility
4= total society responsibility



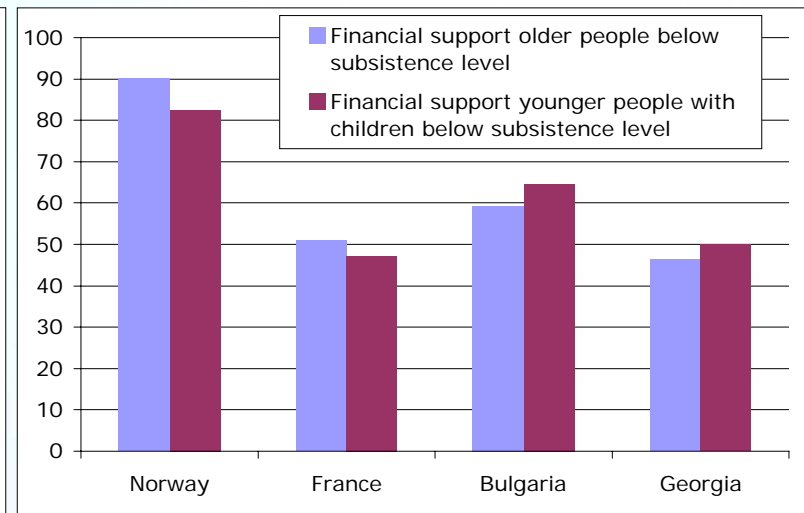
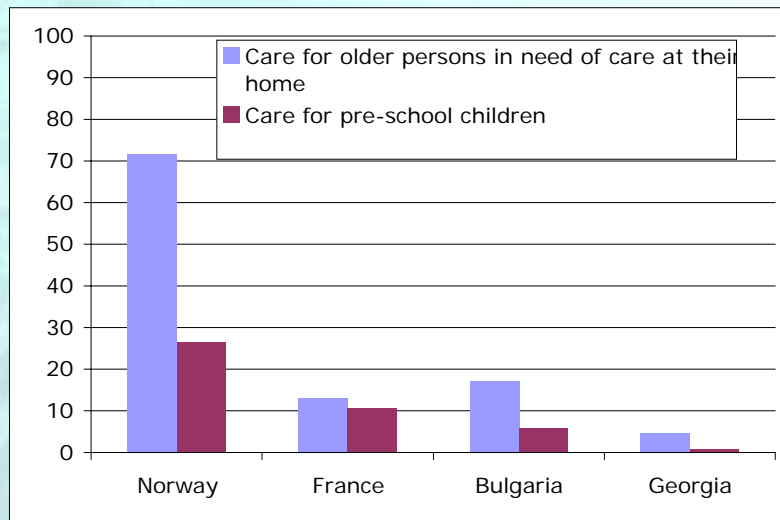
Findings 2

Table 1: Per cent reporting mainly or totally societal responsibility by domain and country.

	Norway	France	Bulgaria	Georgia
Care for elders ...	71	13	17	5
Care for children ...	27	11	6	1
If below subsistence:				
Cash to elders	90	50	59	46
Cash to children	82	47	65	50

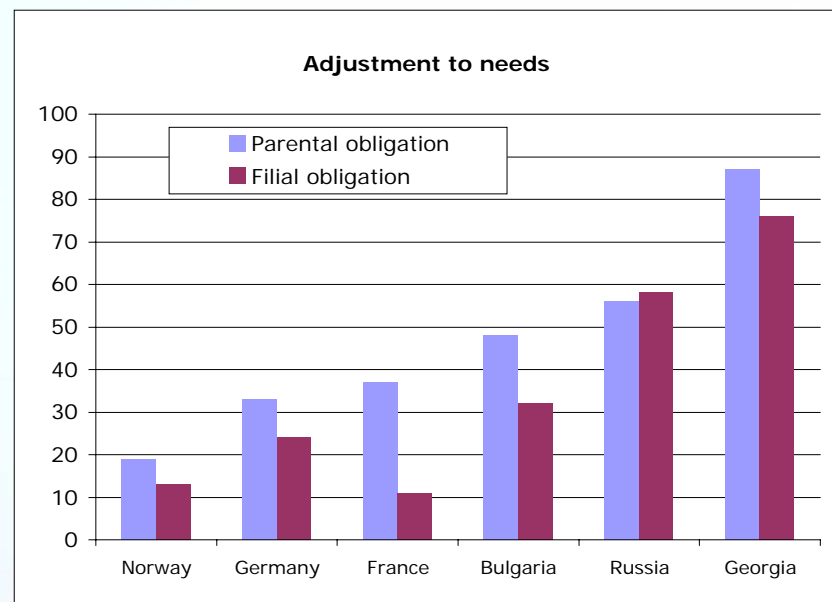
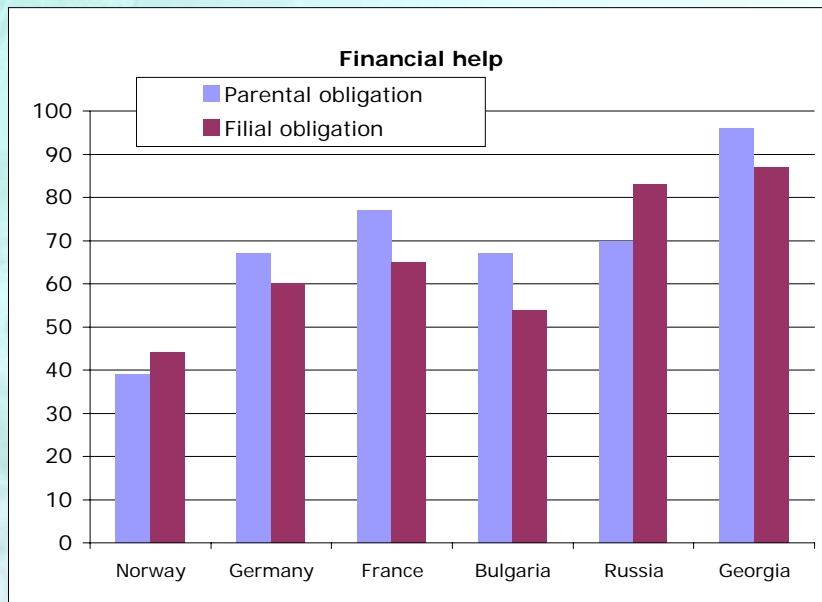
Findings 3

Figure 2a and b: Per cent reporting mainly or total societal responsibility for a: care and b: financial support (cash)



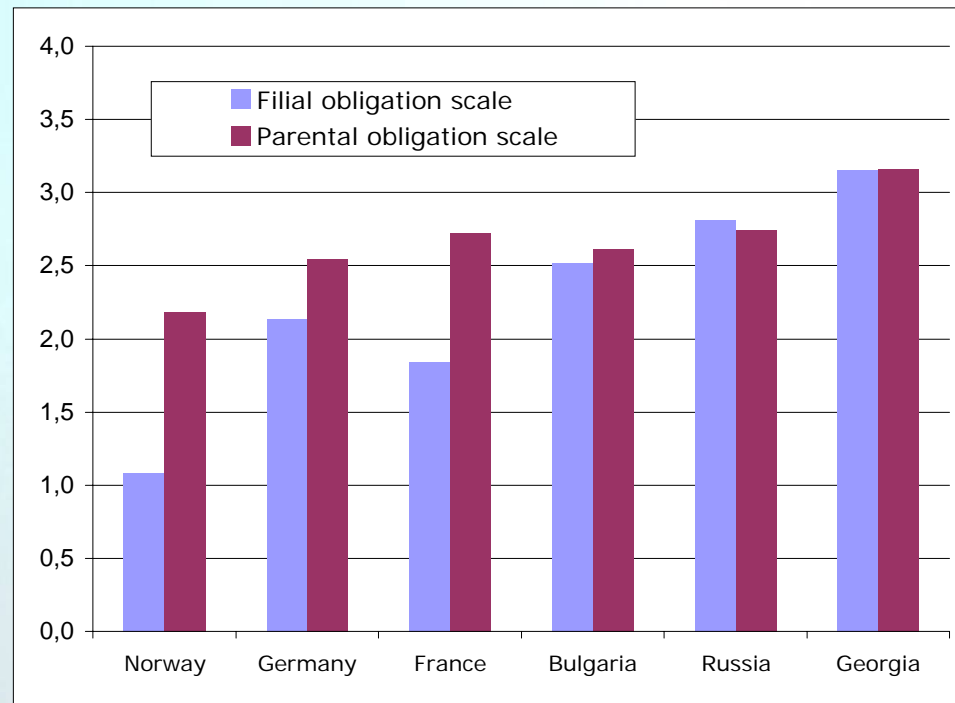
Findings 4

Figure 3a and b: Per cent in agreement with parental and filial obligations by country, a: for financial support, and b: for adjustment to needs of the other



Findings 5

Figure 4: Scores on filial and parental responsibility scales for older respondents (age 67+) by country. Scores 0 (minimum) to 4 (maximum).



Conclusions 1

- Norwegians leave more responsibility to the society than to the family (except for child care). Georgia represents the other extreme with more or less total family responsibility. The other countries are in-between
- Cash support to meet subsistence needs is mainly a societal responsibility in all four countries, nearly totally so in Norway, supplemented by the family in the other three countries
- In summary,
 - Norway: responsibilities mainly societal, supplemented by family
 - France and Bulgaria: equally shared between family and society
 - Georgia: mainly to totally family responsibility

Conclusions 2

- Cash support (for subsistence) more of a societal responsibility than care in all four countries
- Societal responsibility higher for elder care than for child care
- Care for elders
 - Norway: mainly societal responsibility, supplemented by the family,
 - France, Bulgaria: mainly family responsibility, supplemented by society
 - Georgia: nearly totally family responsibility
- Family (both filial and parental) obligations lowest in Norway, highest in Georgia.
- Parental obligations tend to be higher than filial obligations, except in Russia.
- Among older respondents (age 67+): obligations up and down generations are *balanced* in Bulgaria, Russia and Georgia, while priority is *down generations* (higher parental than filial obligations) in Norway, Germany and France.