

**Expert Group Meeting on
Intergenerational Solidarity: Strengthening Economic and Social Ties
United Nations Headquarters, New York, 23-25 October, 2007.**

Background Note

Overview

The World Summit for Social Development (WSSD) held in Copenhagen in 1995, established the notion of an inclusive society as one of the key goals of social development. The Copenhagen Declaration and Programme of Action, a key outcome of the Summit, pledged to make the eradication of poverty, promoting full employment and fostering social integration overriding objectives of development. The Declaration includes a special commitment to advance social integration and to create “a society for all”. Taking the cue from the WSSD, the Second World Assembly on Ageing, convened in Madrid, Spain in April 2002, addressed a key challenge of building “a society for all ages”. The Madrid International Plan of Action on Ageing (MIPAA) recognized a dramatic demographic transformation that has taken place in the world and the profound consequences it has for every aspect of individual, community, national and international life. The Madrid Plan underscored that family and community-level intergenerational ties can be valuable for everyone.

Intergenerational solidarity is fundamental for the healthy development of any society. The majority of people in all cultures maintain close intergenerational relations throughout their lives, despite geographic mobility and other trends in contemporary life that can keep older persons separated from younger generations. The benefits of these relationships work in both directions. Older persons provide significant contributions, financially, physically and emotionally, to the upbringing of the younger generations and to promote the education and care of grandchildren and other kin. Similarly, younger adults contribute to the welfare of parents and/or grandparents’ and other adults in the family. Other aspects of intergenerational dependence have come to light in recent decades. The increase in lifespan for many countries implies that many adults live longer lives over which they can share knowledge and resources with younger generations. Greater longevity also implies that older people are increasingly living longer periods in some form of dependency on younger generations, either on their own family members or others acting as caregivers. Solidarity between generations is thus a major prerequisite for social cohesion, representing a foundation of both formal public welfare and informal community-based care systems.

Trends in globalization and development, including employment and migration trends threaten the maintenance of intergenerational ties. Residentially, many older and younger people are separated from one another, and in many developing countries and countries with economies in transition, the ageing population is dominant in rural areas where social supports are often weaker, owing to the exodus of young adults. Older persons may be left behind without the traditional support of families and even without

adequate financial resources. While older persons lose opportunities to receive support from younger members of families, younger persons also lose opportunities to benefit from the knowledge and guidance of older members of their families.

Many aspects of the demographic transition, global economic development and globalization have influenced opportunities for intergenerational exchange. Trends in globalization and development have led to changes in family structures that have resulted in young people living away or cut off from their families. Factors affecting intergenerational ties, including fertility and mortality, health, livelihood and work opportunities, opportunities for savings and investments and housing to name just a few, are in turn being affected by the behaviour of different generations and their imprint on the world.

The examination of family structures, including the needs and opportunities of families, is particularly important in the context of intergenerational ties. According to a recent study, (United Nations, 2005)¹, about one-quarter of the population in the more developed regions live alone, but under 10 per cent in the less-developed regions do so. There is also a gender dimension: living arrangements of older women, for instance, differ from those of older men: older women are on average more likely than men to live alone. Older women are also more likely to live in skipped generation households or with other relatives. Another conclusion of the study is that the proportion of older persons who live with a child has been declining. Countries with higher levels of social and economic development, on average, have lower levels of co-residence with children. On the other hand, within developing countries, higher social economic status is often associated with higher, not lower, co-residence with children. These trends have important implications for intergenerational solidarity. Co-residence with children is an important element of the flow of support between family members. This is particularly so with respect to informal support that depends on physical proximity such as assistance with basic activities of daily living.

There is a pressing need to address weakening intergenerational connections and the negative consequences they have for children, youth and adults. The web of support provided for all groups through intricate and complex familial relationships is eroding and the care needs of many are increasingly not being met. Society, as a whole, benefits from strengthening and protecting economic and social ties between generations. The MIPAA underscored the importance of “strengthening of solidarity through equity and reciprocity between generations” (para. 44) and called for developing initiatives aimed at promoting mutual, productive exchange between generations, focusing on older persons as a societal resource. Investing in individual life courses, and adopting age-sensitive policies and programmes are essential to responding to the growing intergenerational dependence. Ensuring workplace flexibility, lifelong learning and promoting healthy lifestyles, especially as young people make the transition to adulthood are particularly

¹ United Nations (2005). *Living arrangements of older persons around the world*. United Nations publication. Sales No. E.05.XIII.9

important from the life course perspective. Also important is strengthening the social and economic environment of families, neighborhoods and communities and prevent the intergenerational transmission of poverty, a topic that has received a lot of attention in the past two decades.

It is recognized that intergenerational ties can be valuable for everyone at the family and the community level. While younger persons benefit from the financial support and the knowledge and guidance provided by older family members, youth development is increasingly becoming a prerequisite to meeting the growing care demands of older people and the condition for the development of society as a whole. Sound, ageing-specific policies strive to eliminate discrimination and social exclusion of older persons. Activities aimed at building public awareness should sensitize youth and other age groups on the importance of promoting the rights of older persons. Linking both ageing specific and youth specific policies to development facilitates better participation of both groups in society.

Concepts

A necessary starting point for the discussion is a clarification of what is meant by “intergenerational solidarity”. Intergenerational solidarity can be understood as a sense of mutual dependence between people, arising from shared or common interests that generate any number of positive social outcomes (Seedsman, 2004).² Others have defined the concept as a social contract, based on reciprocity across generations. This can be observed in the present era with the pension system, social security and other elements of the modern welfare state (Lindh, Malmberg and Palme, 2005).³ Intergenerational solidarity has also been considered in the context of affectual solidarity, or the positive sentiment held by family members and the degree of reciprocity of these sentiments; consensual solidarity, or the degree of agreement on values, attitudes and beliefs among family members; normative solidarity, or the strength of commitment to performance of familial roles and to meeting familial obligations; and structural solidarity, or an opportunity structure for intergenerational relationships reflected in number, type and geographic proximity of family member (Bengtson and Schrader, 1991).⁴

Objectives of the Expert Group Meeting

Within the broad objective of developing specific strategies to promote social inclusion and enhance solidarity between generations, the meeting is geared at exploring essential elements of solidarity at all levels -- in families, communities and countries. The meeting is a part of the ongoing efforts of the United Nations Division for Social Policy

² Seedsman, Terence A. (2004). Keynote address delivered at Global Challenges: Future Directions- Intergenerational Programmes, Research and Social Policy. University of Victoria, British Columbia, June 3-5.

³ Lindh, Thomas, Bo Malmberg and Joakim Palme (2005). Generations at War or Sustainable Social Policy in Ageing Societies? *The Journal of Political Philosophy*, vol 13, (4).

⁴ Bengtson, Vern L. and Robert E.L. Roberts (1991). Intergenerational Solidarity in Ageing Families: An Example Formal Theory Construction. *Journal of Marriage and the Family*, vol. 53 (4), November.

and Development to clarify the meaning of social policy in the contemporary world and analyze policy options in the context of changing demographic, social, and economic circumstances.

This meeting of experts is conceived in the context of the work of the United Nations Division for Social Policy and Development's work on ageing-related policies on the one hand and policies that support youth development on the other hand. In the context of the above, key questions to be considered include: how can existing policies be adapted and changed to foster solidarity between generations and thus promote social cohesion? How can opportunities be maximized to maintain and improve intergenerational relations in local communities? How can generational segregation, especially between older persons and youth, be avoided? How can the welfare of adults who perform the important tasks of "intergenerational care" that is, caring simultaneously for their parents, their own children and their grandchildren be addressed? The meeting will identify practical and meaningful ways of promoting intergenerational solidarity in contemporary society. This will be achieved through examining policies, case studies, and existing approaches, mainly at local and community levels.

The meeting specifically aims to:

- a) Review various dimensions of intergenerational solidarity and assess facts and trends, including demographic changes, intergenerational care and transfers, migration, and labour force participation of youth and older people;
- b) Examine current initiatives and existing strategies to promote care-giving and care receiving;
- c) Identify methodological aspects that could facilitate research and analysis on the advantages and disadvantages of different living arrangements in the contexts of intergenerational solidarity and create a knowledge base in this area;
- d) Analyze the changing roles of social institutions (such as families, communities, the market, and the public sector) in the promotion of intergenerational solidarity; and e) explore options for the follow-up to the meeting, including additional research and publications on the topic.

Key considerations in these discussions include how to promote mutual support among generations, especially between older persons and youth; what can be done to avoid conflicts among generations; and how to address the specific needs of various socio-demographic groups in this context.

Methodology

The Expert Group Meeting will approach the discussion from a life-course perspective, which aims to highlight the developmental and dynamic components of human lives, institutions and organizations. One of the main features of the life-course approach is to acknowledge the crucial role that time, in its various dimensions, plays in the understanding of individual behaviour and structural changes in society. Another important dimension of the life-course approach is its attempt to take a holistic view, in

that the analysis no longer focuses on specific events, phases or demographic groups as being discrete and fixed, but rather considers the entire life trajectory as the basic framework for policy analysis and evaluation. In this context, to take the life-course perspective is to acknowledge that time and history are important concepts, and that individuals, households and institutions undergo experiences that change over time and that affect their welfare at a later stage. The major implication of such an approach is that life-courses are individually and socially constructed. Modern societies shape the sequence and timing of major life events such as education, employment, marriage, child birth or retirement based on existing social norms, values and the prevailing institutional structures. The meeting will address the issue of how to respond to conflicting time demands through the life-course for having children, caring for dependants and investing in lifelong learning.

Another issue for discussion is how to respond to the higher participation of women in the labour market and how to respond to the growing heterogeneity of lifestyles, individual needs and preferences in the wake of the individualization process, coupled with more erratic employment trajectories. Transition out of the parental home and entry into the labor market for young people without children is another important challenge. The EGM will concentrate on a range of household categories coinciding with different transitions and phases in the life-course. For example, union formation (co-habiting couples without children); parenting (differentiating couples according to the age of children); midlife “empty nest” periods (middle-age couples without co-habiting children) and elderly phase (exit out of the labour market).

Proposed substantive themes and outline of the Expert Group Meeting

1. Intergenerational solidarity: What does it mean and what are the key issues?

How is intergenerational solidarity defined? How has it evolved among different communities/countries/regions (affected by ageing, gender, class, ethnicity, migration, and changes in values, norms, living arrangements, affection, closeness, instrumental support, etc.)? What is the current evidence on patterns and trends among countries or regions? Between developed and developing countries? What is the current policy context with regard to intergenerational solidarity? Are there policies? Are they implemented?

2. Determinants of the complex interchange among generations: Collaborations and conflicts

What are the social and economic conditions affecting intergenerational exchanges? What are the roles of -

Demographic change;
Living arrangements;

Economic trends and patterns, including labour market trends;
Migration; internal and international;
Other factors associated with globalization;

3. Overview of existing instruments and policies that affect intergenerational solidarity

Review the roles of individual, household, community, state and level factors, including-

Individual preferences
Culture and societal organisation
Gender issues
Resource allocation and public provision of social services;
Social protection schemes;
Poverty reduction policies;
Privatization of health care, pensions and other social services

4. Regional dimensions: What are the unique issues for different world regions?

Address specific regional, cultural and national dimensions and challenges
What are the most important considerations in identifying policies for developing and developed countries?
Are there best practices? What are they? What is to be avoided?

5. Required policy interventions:

Discuss and propose policies required to enable societies to:

Adapt to the new realities and challenges of ageing,
Promote employment opportunities and labour flexibility,
Support lifelong learning and the intergenerational transmission of knowledge
Reduce intergenerational conflict and promote cohesion

6. What next?: Recommendations and Questions/issues for future research/policy making, policy implications