

**Department of Economic and Social Affairs
Division for Social Policy and Development**

Expert Group Meeting

**Intergenerational Solidarity:
Strengthening Economic and Social Ties**

Recommendations



**23-25 October 2007
United Nations Headquarters
New York**

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

At the invitation of the Social Integration Branch of the Division for Social Policy and Development, a group of international experts and United Nations staff members (see list of participants) met, at the UN New York Headquarters in October 23 -25, 2007 to consider key issues affecting intergenerational solidarity, to review best practices in existing policies and programmes and to formulate policy actions and recommendations to address existing gaps and challenges. A full report of the meeting is forthcoming. This summary highlights core issues and key recommendations emanating from the three-day discussion.

While the issues and recommendations presented here do not exhaust the many specific ideas that came up in the discussions, they do highlight and elaborate on the core concepts, interventions and activities that participants felt would be needed to advance the understanding and promotion of intergenerational solidarity. For the most part, participants considered Governments to be the key actors in ensuring the implementation of the following recommendations. However, the roles of civil society, the private sector and other stakeholders were also deemed critical to build a wide network of support and create a policy advocacy community that can influence policy makers and get them to act.

DEFINITION AND FRAMEWORK

Experts acknowledged that a first step is to agree on a definition of “Intergenerational Solidarity” (IG solidarity) that is relevant, comprehensive and a starting point for the development of an analytical framework, assessment tools and policy recommendations. They agreed that IG solidarity can be defined as social cohesion or integration among generations. Also known as the social contract (compact), IG solidarity enables the carrying of knowledge and culture forward through generational interdependence and interactions across ages, including among the youth, and those at middle and older ages.

The scope of interactions across the ages can cover issues related to bondedness and closeness, consensus and conflict, as well as transfers and other types of exchanges both financial and non-financial. Participants were of the view that the interdependence among generations during the life cycle can be analyzed at two levels:

- a) Macro generational cohesion among age groups (cohorts) who identify with specific events or national and global situations; and
- b) Micro generational cohesion among grandparents, parents and grandchildren within families. Relationships among these generations include those among members of nuclear and extended families - aunts, uncles, cousins, siblings, etc.

Experts agreed that macro and micro IG relationships are dynamic and ever changing. IG connectedness and tensions are natural to the process of social change and to the confluence of societal interests, desires, security and sustainability.

Experts agreed that although IG issues affect both developed and developing countries, there are distinct challenges and issues for developing countries. Developed countries face threats to IG solidarity especially in the context of growing independence in living arrangements for older persons. However, they are better shielded to a large degree because of their relatively advanced social security provisions. They nevertheless face challenges related to their rapidly ageing populations whose demands are outstripping available services especially in health and care giving. It was also acknowledged that while a number of issues impinge on IG solidarity across all world regions, some are hurting the developing world in a disproportionate way. The HIV/AIDS epidemic, the loss of precious human capital through out-migration, and obstacles to nurture and cultivate a strong human capital at home are particular obstacles for developing regions. For example, with limited resources to provide adequate income security for older persons, filial support is the only way for many older persons to survive. When these relationships are broken or not properly maintained, older adults face a grave situation. A related issue is rural ageing in developing countries which is of most concern. Given high rural-urban migration and almost non-existent geriatric infrastructure in most rural areas

across the developing world, older persons are likely to face severe difficulties unless their families have the resources and ability to provide for the well-being of their ageing members.

It was emphasized that the use of an IG approach to social development provides important benefits to society. It creates favorable conditions for participatory dialogue and it promotes a just society for all, often in a cost-effective manner that builds on existing social networks and does not require major public sector interventions.

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MEASUREMENT AND INDICATORS

The Meeting agreed on the need for methods and tools to measure IG solidarity. It was agreed that the definition of IG solidarity must allow for measurement and the inclusion of different dimensions and interactions of various aspects of solidarity. The availability of tools to measure the degree of integration among generations and timely data collection is essential for providing vital information on opportunities and challenges that societies face as they try to build social cohesion, responsible citizenship, security and sustainability.

As a first step it is necessary to explore how IG solidarity has been measured and how existing approaches can be adapted or applied to current familial, as well as non-familial, situations. A framework or foundation for identifying key indicators that can be used to track and monitor progress must be identified and agreed upon. In this context, it is useful to examine the language used in UN documents regarding Youth, Family and Ageing, and find what concepts they have in common and what the differences are. Frameworks that have been used in the family solidarity literature could be a good starting point.¹

¹ See, for example, the Intergenerational Solidarity Model developed by Vern Bengtson and presented in Vern L. Bengtson and Robert E.L. Roberts, 1991. "Intergenerational solidarity in Aging Families: An Example of Formal Theory Construction," in *Journal of Marriage and the Family* 53 (November): 856-870.

Another approach is to measure IG solidarity by the number and impact of existing programmes, opportunities and points of interaction among generations. There is need for measurement of the number, content, quality and impact on generational cohesion of the existing IG programmes, and for ways to evaluate existing and new programmes. Appropriate indicators need to be defined through international exchanges on these issues.

Participants agreed that indicators can and should differ across contexts, but the framework of analysis should be broad enough to cover key aspects of IG solidarity. Indicators for each country should take specific country, cultural and local conditions into consideration in order to promote a country-specific and culturally sensitive approach. Apart from identifying new indicators, it is recommended to integrate IG dimensions into existing social and economic indicators.

The measurement and tracking of progress could be bolstered by a UN system restructuring and resource allocation and/or by creating a small unit within DESA to facilitate the monitoring of IG solidarity regionally and at the country level.

RENEWAL OF THE INTERGENERATIONAL CONTRACT

To ensure the renewal and continued protection and promotion of IG solidarity, it is important to mainstream considerations of IG solidarity in all areas of social programming. The interconnectedness of all ages should be promoted through opportunities including educational, housing, health and community services.

It is essential to revisit and revise how academic and international institutions classify and analyze age groups to ensure that the linkages and dependence across generations are explicitly recognized. The UN, in particular, may want to review its programmes that are defined along age lines to ensure that appropriate feedbacks are recognized and harnessed and that different stages in the life cycle complement each other. Meaningful opportunities should always be provided for young and old people to engage in IG

interactions. All stakeholders may review and make adjustments to policies and programmes as lifespan and good health increase.

Participants emphasized that poverty reduction is essential for empowering all ages in a way that fosters and protects IG solidarity. Government and the private sector should focus on financial sector development and support proper micro pension (savings and work-related) schemes that protect older people and their dependants from poverty. Governments should promote better understanding and analysis of how remittances from migrants are employed in receiving countries and how they could be used to help families with benefits across generations.

To support the adoption of policies, implement programs, assess outcomes and promote the use of an IG lens in the formulation of social strategies, Governments should consider the appropriateness of establishing IG Solidarity offices in existing ministries, create cross ministry working groups to protect the IG contract, or appoint a high-ranking officer to oversee progress in this area.

FAMILIES

Experts highlighted a need for policies that allow families to manage the responsibilities of family care and work. Programmes to promote flexibility in work scheduling and other supportive work programs should be encouraged to enable families to balance care for younger children, older adults and other dependent family members with work. These policies are particularly necessary for women and mothers with childcare needs to enter into the labour market.

To address the healthcare needs of all generations, and needs of care givers within families, especially those who also work outside the home, experts recommended drawing examples from countries such as Israel, Japan and Korea to enact long-term insurance laws which guarantee care for older generations. Policymakers should consider extending coverage to families caring for dependent generations.

Governments providing incentives to families to raise fertility rates in order to counter rapid ageing must also introduce reproductive health care policies with an IG perspective, providing care to both parents and their children.

Policies should be developed to design and implement support mechanisms for both grandparents and children (typically under the age of 16, but it would vary depending on a particular community's circumstances) who may be responsible for caring for other family members. Since young caregivers are a vulnerable group, social protection measures and cash-transfers as well as policies designed to provide psycho-social support and counseling may be required. The need to institute violence prevention programmes that protect younger and older women and other vulnerable groups from abuse was emphasized. Programmes must provide education to individuals, families and communities about the changes associated with ageing so that these changes do not become the basis for discrimination against older persons and for their exclusion from accessing their full rights.

Experts emphasized that programmes should promote policies that support IG transmission of culture and values. In addition, recognition and respect for diversity and culture should be at the center of efforts to design, implement and assess community rehabilitation programs that require participation of the young and old.

EDUCATION AND LEARNING

Experts recommended the infusion and mainstreaming of IG issues into education systems. In addition, educational institutions should consider welcoming all generations as learners and teachers to encourage lifelong learning. The promotion and transmission of knowledge and the mentoring of youth by adults and adults by youth can enhance the prospects of both groups for decent employment and/or other meaningful activities. There is potential for considerable exchange in the area of information, communication and technology (ICT) skills and experience.

Experts agreed that there is a need to advocate for a life cycle approach to teaching and learning throughout the school and higher education systems. To the extent possible, both formal and non-formal opportunities should be created for cross life cycle interactions in education. This should be supported by revised curricula that are built on an IG perspective and that include issues related to families, gerontology and youth.

Experts noted that religious institutions and faith leaders may play important roles in forging IG relationships within families and communities. They often contribute to building social cohesion and they can provide support and educational services to their communities. Because of their close access to families and individuals on a fairly frequent basis, faith-based institutions and leaders can play an instrumental role in strengthening bonds between older and younger persons.

EMPLOYMENT

It was recognized that a strong link exists between the labour market trends and IG solidarity. Both older and younger people need to have opportunities to build their human capital so that they can remain in the labour market if they want to. Apart from formal work opportunities, it is important to also provide opportunities for informal work, flexible work schedules and volunteering for both young and old.

However, policies and programmes must be put in place to support workers who have care responsibilities (IG care givers). This could include tax incentives and other instruments to help alleviate the financial and non-financial challenges of care-giving. Provisions must be made to support work and care responsibilities of those who work but who also take care of older family members. Further it was suggested that new approaches and incentives are needed for supporting the joint participation of different generations in the labour market in a complementary manner.

Experts acknowledged that push and pull factors continue to promote migration globally. Policies need to address the adjustment of migrants to new labour markets, social protection coverage for migrants, creation of productive and decent job opportunities, and

the strengthening of human capital in countries that lose migrants and across different borders.

HEALTH

The Meeting acknowledged that equal opportunities for health care should be provided for all ages. Similarly, access to age appropriate health care must be ensured. With the support of Governments, civil society and non-Governmental organizations, emphasis should be placed on disease prevention and health promotion programmes rather than solely on curative care. Ample evidence shows that substantial drops in morbidity and mortality rates can be achieved through preventive care for infants, children and pregnant women. Programmes must emphasize intergenerational and joint responsibility for creating a culture of healthy habits and practices.

Experts also realized that IG relations have undergone considerable change in countries that have been severely affected by HIV/AIDS. In parts of Africa, children, youth and older persons now provide care for families that have been affected by HIV and AIDS, yet few benefits are available to support these new IG responses to the region's health crisis. Policies must be established to ensure that social and economic benefits are available for those who provide such care. In particular, there should be a focus on providing better support systems for caregivers – both young and old.

SPECIFIC POLICIES RELATED TO OLDER PERSONS

While Experts emphasized the need to use an IG approach in addressing all issues and for a focus to be placed on a life cycle approach, it was clear that a number of the obstacles to IG solidarity relate to the lack of equal opportunities for older persons, in particular, in all areas of life. Discrimination against older persons in society is also an issue of major concern. There is therefore a need to address specific issues and policies that contribute to this.

Recommendations were made to promote age-integrated living arrangements and/or communities (such as prevalent models in Israel, New York City and in North Carolina).

Age segregated housing should be discouraged and instead, policies should promote housing for older persons within multigenerational housing complexes and communities. Examples of the latter are kangaroo living arrangements where two or three generations are living together and can easily take care of one another (such as in the Netherlands). These efforts address the social isolation of older people. Other all age inclusive spaces include parks, recreational and educational facilities, to cite a few.

PUBLIC AWARENESS AND THE MEDIA

An essential approach to promoting IG solidarity is by ensuring that it receives positive and constant attention in the media, and that leaders are encouraged to speak out in support of IG solidarity. Efforts should be made to increase public awareness about issues affecting IG solidarity and emphasizing the nature of cultural transfers that flow both up and down across generations. This can be done through coverage of IG issues and discussions in the media among different age groups, and thus promote open IG discourse about IG solidarity and relations.

INSTITUTIONAL, SOCIAL AND POLITICAL CONTEXT

The Expert group recognized that a number of factors that impinge on IG solidarity or that can be manipulated to support stronger bonds across generations are institutional, and many relate to issues such as culture and political and social organization. There is a need to work towards “IG programming” that gives all age groups meaningful roles to play, involving collaborative partnerships between individuals, institutions and organizations that serve different age groups in their efforts to address community needs such as after school child care, neighborhood safety, or support for homebound older persons.

Experts recognized the need to promote IG dialogue in the process of policy making in the public and private spheres. They noted that different institutional mandates can create conflicts and fragmentation in how IG solidarity is addressed. For this reason, it is recommended that at the country level efforts should focus on promoting cross-institutional and cross-sectoral collaboration in order to create a comprehensive national

perspective and approach. Collaboration should also be increased between decision makers at community, district or municipal levels. In addition, it is necessary to promote government, NGO and private sector collaboration to maximize available resources for promoting solidarity. This should be backed by greater transparency in funding for IG programmes, decreasing age segregated funding streams and an intentional effort to weave funding sources to support IG solidarity.

In developing countries especially, it is important to strengthen social protection schemes and to review and revise policies relating to pensions and related benefits for older persons to fulfill the IG contract. Countries with a tradition of social insurance schemes should continue to protect their insurance mechanisms because often, these are the only avenues through which a large portion of beneficiaries with disabilities or survivors of deceased workers are supported. Where necessary, alternatives to standard contributory pensions should be explored for a better financing of pensions. Cash transfers and social pensions should be considered. In this connection, Experts emphasized the need to recognize the right to income security at old ages.

In countries with rapid ageing such as in Europe and Japan, there is a risk of overburdening social protection programmes due to an increased eligibility for pension benefits and transfers with potentially adverse consequences on the sustainability of these schemes. To address this situation, Governments should design a well-balanced transfer system that is robust in anticipating foreseeable changes in the age structure. In addition, Governments should adopt a dynamic definition of old age, i.e., that increases as life expectancy and health conditions for older people improve.

FURTHER RESEARCH

Experts agreed that research was needed on a number of issues related to IG solidarity, especially on measurements and evidence-based practices. These would form the basis for experience-based decision making. The results of such research should be disseminated through various means, including a website (see for example,

www.icip.info). Experts recommended that decision makers should be educated on IG research findings and best practices to influence policy actions.

Surveys should be conducted to collect information from countries and regions on the current policy context with regard to IG solidarity as well as on national responses to economic and other changes that affect IG solidarity. Longitudinal, comparative, and cross-cultural IG studies, especially, are essential. Other themes that require additional analysis include: migration and remittances, the economic security and well-being of children and older people, and the impact of migration on productivity growth. There is a major need for further discussion of the cross-cultural and cross-national aspects of IG solidarity.

A follow-up EGM should be convened on this topic.