

Securing solidarity between generations: inter-generational cohesion in the face of demographic change, with particular focus on individual and familial factors and their relation to societal development ; preparatory expertise for the International Plan of Action on Ageing 2002

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Securing Solidarity between Generations

Inter-generational cohesion in the face of demographic change,
with particular focus on individual and familial factors
and their relation to societal development

*Preparatory Expertise for the International Plan
of Action on Ageing 2002*

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1. Preliminary Remarks: The Vienna International Plan of Action on Ageing (1982)

The 1982 Vienna Plan looks at relationships between generations from two perspectives. They are given concise expression in the Preamble (United Nations 1982). The countries that met at the World Assembly on Ageing in 1982 were primarily concerned to ensure that the generation of older persons could “enjoy in mind and in body, fully and freely, their advancing years in peace, health and security”. The World Assembly was secondly concerned to examine the “impact of ageing on development” and to find answers to the question how the increase in the ratio of older persons in total population affected socio-economic development in a given society. This included the question of the extent to which younger generations are willing and able to support older generations. These perspectives on relations between generations—with the poles “solidarity” and “equity”—are apparent throughout the 1982 Plan. Domains and focal areas in which the older generation needs the solidarity of the younger generation are named, and the costs and burdens to be borne by the younger generation are discussed.

The 1982 International Plan of Action on Ageing largely ignores the issue of how the societal, family and individual prerequisites for providing this solidarity can be created and supported. Under the heading “Principles” aspects of societal development are listed without analysis of their interdependence and interactions. Two examples: “... economic growth, productive employment, social equity and human solidarity are fundamental and indivisible elements of [socio-economic] development” (25a). And: “An important objective of socio-economic development is an age-integrated society, in which age discrimination and involuntary segregation are eliminated and in which solidarity and mutual support among generations are encouraged” (25h).

Instead, the Plan of Action appeals to those who are to assume responsibility for the older generation. The Principles state, for example, that: “Governments, non-governmental organizations and all concerned have a special responsibility to the most vulnerable among the elderly, particularly the poor, of whom many are women and from rural areas” (25m). However the conceptualization of solidarity between generations is far too one-dimensional.

In the first place, inter-generational solidarity is assumed throughout to be an anthropological universal. In the introductory remarks on the “Recommendations for Action” it is pointed out that respect and care for the elderly have been “one of the few constants in human culture everywhere”. Recommendations on securing inter-generational solidarity are formulated solely with the family in mind (66-67) and, moreover, tend to remain general. As the family is recognized as a fundamental unit of society, efforts are urged to support, protect and strengthen it (Recommendation 25); special support is recommended for families that continue to care for elderly relatives (Recommendation 26); particular consideration is advised for the special needs of widows

(Recommendation 27); and for the integration of older persons and their families (Recommendation 28); and the provision of social services for carer families and financial support for low-income families is advocated (Recommendation 29).

Secondly, solidarity is understood as a one-way affair, primarily flowing from the younger to the older generation. There is no discussion of mutual responsibilities in inter-generational ties and relationships, a subject that is receiving increasing attention in the current societal debate on the further development of social welfare arrangements.

This expertise is concerned with how inter-generational solidarity can be secured in the future, taking into account demographic change, individual and family factors, and the role they play in overall societal development. It is posited that solidarity among generations is not a fundamental fact of family and societal life simply to be taken for granted.

It is argued that relations between generations are fundamentally ambivalent and that societal inter-generational relationships always depend on preconditions. To postulate a basic solidary constellation per se appears singularly unhelpful especially in discussing the developmental perspectives of inter-generational ties and relations. Furthermore, these ties and relations influence each other—solidarity between generations within the family can equally well be considered a prerequisite for the societal contract between generations (cf. Leisering & Motel, 1997) in the same way as public social security can be seen to provide the basis for private inter-generational support (cf. Kohli, 1999; Motel-Klingebiel, 2000).

The concept of ambivalence permits the sometimes conflictual developments in inter-generational ties to be conceptualised as familial negotiation processes. Such negotiations concern mutual help and support in multi-generational families, and take place against a background of increasing complexity in family structures and biographies and increasingly individuated life courses in modern societies (cf. Lettke & Lüscher, 2000; Lüscher 1998). At the societal level, too, actual relations between generations—primarily those concerning the distribution of societal wealth—are to be seen as the outcome of continual negotiations. Societal negotiatory processes involve social security institutions responsible for determining and assuring inter-generational redistributions for the purpose of guaranteeing societal participation, but which also have to consider generational equity to safeguard the basis of their legitimacy. In times of steadily growing affluence, such as West Germany experienced until well into the 60s, these negotiatory processes could proceed relatively uncontroversially owing to a redistribution policy that allowed almost all sectors of the population to participate. In view of demographic shifts, the structural overburdening of social security systems, and changes in the general economic setting, which have substantially narrowed the distributional scope of the welfare state, conflicts that have hitherto remained latent are increasingly emerging. Family and societal negotiation processes require a reliable

framework and rational management if social cohesion (rather than disintegration), one expression of which is inter-generational solidarity, is to result.

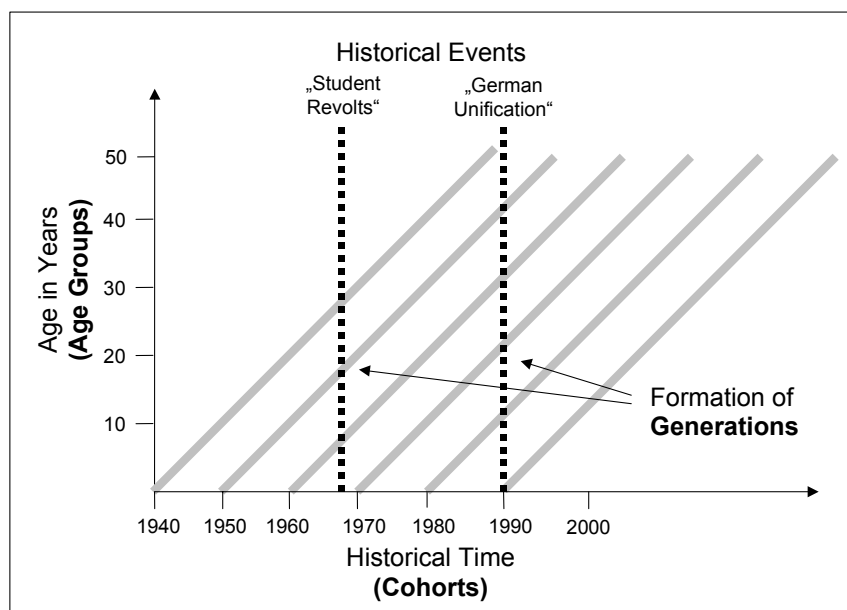
In the coming sections (a) concepts and theoretical positions are discussed, (b) developments since the Vienna Plan are outlined, (c) criteria for assessing generational relations and ties are put forward, (d) recommendations for policy and societal action are put forward, and (d) the impact of European unification on the situation is discussed.

2. Concepts and Theoretical Positions

2.1 Generations

Generations are primarily established within families (Höpflinger, 1999). The genealogical concept of generation addresses descent relationships in families and the relationship between grandparents, parents, children and grandchildren. The form of family inter-generational bonds, for example the form and stability of families, depends on social, cultural, and demographic changes (Peuckert, 1999). In addressing the subject of solidarity between generations, it is useful to take account both of inter-generational relations among members of families and of the changing “developmental functions” of the family over time: from growing up as a child, founding (one’s own) family, the birth of grandchildren, the common lifetime of different generations, and the care of ageing (grand-)parents, perhaps in need of assistance and long-term care (Schneewind, 1999).

Figure 1: Schematic depiction of the connection between life course and societal development (age groups, cohorts, generations)



Nach Riley & Riley, 1992.

The use of the concept “generation” in the International Plan of Action is, however, not restricted to the micro-level (family generations) but is also applied at the macro-level (societal generations). If one uses the concept “generation” as a sociological term, it needs to be differentiated from the concepts “age group” and “cohort” (on the concepts age group, cohort, and generation, see figure 1; cf. also Riley & Riley, 1992) *Age groups* are groups of persons constituted by age limits. For example, people who are 60/65 years old and above (“older generations” in the terms of the International Action Plan), or persons who are between 15 and 64 years of age (“economically productive population”). From a social policy point of view, age groups are relevant because societal arrangements and distribution rules (on protective provisions, transfers, and social services) are often linked with age limits. The concept of *cohort* points to membership of contiguous years of birth: all persons born within a given period belong to a birth cohort in this methodological-statistical sense. The concept of *generation* was introduced with reference to the societal level by Karl Mannheim in a sociology of knowledge context (Mannheim, 1928, Dilthey, 1875/1924; Pinder, 1926). Mannheim described *generations* as being groupings of people born in the same year or at about the same time who experience historical events and everyday cultures in the same way especially during the formative phases of childhood, adolescence, and young adulthood, and who have developed a sense of belonging. Only under certain formative conditions, therefore, does generational *location* (membership of a birth cohort) produce genera-

tional *cohesion* (Zusammenhang) let alone generational *entelechy* (a sense of belonging in the case of the “68 generation”) (Bude, 1995; Bude, 2000). According to Mannheim only generational *entelechy* is to be understood as generation in the real sense of the word. Mannheim was primarily interested in the problem of continuity and social change in view of the constant arrival of new culture bearers, the just as constant departure of past culture bearers, and the associated need to pass on cultural knowledge. This addresses two key facets of the generation concept, namely the “political” and the “cultural” aspects (Kohli & Szydlik, 2000). “Economic” generations, by contrast, are formed by common economic situations, opportunities, and also risks. With the development of the welfare state after the Second World War, these situations, opportunities, and risks were modified and increasingly determined by the position vis-à-vis the welfare-state system of security, the access afforded to societal resources, and the degree of actual or eventual social security provided (Leisering, 1992; Leisering, 2000). In this sense, there is growing reference to “welfare-state” generations.

This expertise examines the difference between generational ties and generational relations in order to distinguish between the family and societal levels (Kaufmann, 1993; Kaufmann, 1997a; Schütze, 2000). The term “generational ties” (*Generationenbeziehungen*) is used to refer to the familial, personal level, and “generational relations” (*Generationenverhältnisse*) to refer to the societal, impersonal level. Table 1 compiles and defines the relevant concepts.

Table 1: Generation Concepts

| Family level | |
|-------------------------------|--|
| <i>Generational ties</i> | Generational ties concern the personal, specific relations between members of different genealogical generations within a family (e.g., grandparents, parents, and children) |
| Societal level | |
| <i>Generational relations</i> | Generational relations concern the impersonal relationship between age groups of a population (e.g., beneficiaries and contributors to statutory pension insurance funds). |

2.2 Solidarity

The concept of solidarity goes back to the liability law category “*obligatio solidum*” of ancient world, which required all members of a given community to assume mutual liability for one another. The concept took on its specific historical meaning in the early 19th century in the context of the fundamental social changes triggered by modernisation and the resulting policy discussion on the future development of society.

Three perspectives can be distinguished. *First*, new social movements such as the labour movement arose, which used the solidarity concept as an autonomous identification factor vis-à-vis bourgeois society, intended to denote a special, collectively mediated workers' community of experience and conviction, superseding or redefining the traditional concept of "fraternity". This type of "exercise of systematic overall commitment" characterized, for example, by the statutes of the International Labour Association, proved its worth not only in direct strike situations but was also embodied in numerous self-organised mediation institutions such as friendly societies and provident funds. The societal generalisation and adoption of these deliberately particularistic principles by the major social insurance systems shows that this transformation was an important prerequisite for the development of the modern welfare state. However, this transformation reveals another facet of agreement on solidarity: the interests of a particular group tended to lose their privileged nature, and the perspective broadened to include the interests of all socio-economic actors or constellations of actors to be taken into account in negotiating the welfare-state. In this wider horizon, the solidarity debate discovered the dynamics of collective action and the underlying *theory of rational behaviour*, according to which, in the pursuit of parallel interests, individuals and collectivities can associate in limited or permanent structures and coalitions, thus making cooperative social behaviour possible (Bierhoff & Küpper 1998, 1999; Olson 1968/1992). In this context, solidarity in current welfare states can be described as the expression of distribution effects of social insurance systems—at the same time, however, solidarity is a keystone of their moral status and legitimacy as well as the public benchmark for the reform of such systems.

The *second* perspective on solidarity derives from 19th century French social theory (e.g., Fourier, Renaud, up to Comte) and finds its theoretical climax in Durkheim's attempt to formulate a developmental theory of the moral foundations of division-of-labour societies in terms of "mechanical" and "organic" solidarity, which together constitute "social" solidarity as a binding and integrational force in society (Durkheim 1893/1988). He saw traditional societies with segmentary structures and a high level of congruence in their "collective consciousness" as characterised by mechanical solidarity, whereas societies resting on the division of labour, manifesting increasing individuation and social differentiation, exhibited a parallel high measure of interdependence among members of society, to be controlled by means of morality and law. Durkheim considered this control dimension all the more imperative as potential societal pathologies in the form of anomies and inequality-intensifying consequences of the division of labour have to be taken into account and compensated. To this extent "morality" and "solidarity" are almost synonymous categories for Durkheim. This understanding of solidarity in terms of a collective consciousness and its moral imperatives have had an impact beyond the field of philosophical discourse and have influenced competing social theoretical approaches.

The *third* perspective, developed by Catholic social teaching, takes an almost philosophical-anthropological view of solidarity, which, at least in its consensual essence, it still endorsed today. Since human beings by their very nature cannot survive alone without social complementation, they require dialogical and personal congruity, generating a need for solidary behaviour (Pesch 1904/1914, Nell-Breuning, 1985).

Depending on one's theoretical standpoint, the solidarity concept today thus also covers aspects of societal order or characteristics of individual action, refers to reciprocal exchanges (solidarity in the narrow sense of the term), and also asymmetrical assistance (in the sense of altruistic charity), and is used both descriptively and prescriptively (Bayertz, 1998b). In view of the multitude of aspects that are to be taken into account, the following definition will be used as an action theoretical working definition: "An act is termed solidary that includes certain forms of helpful, supportive, cooperative behaviour and which is based on a subjectively accepted commitment or a value ideal" (cf. Wildt 1998, Thome, 1998). These mutual ties and obligations among group members, characterised by shared living conditions, shared convictions, and shared values, can, according to Bayertz, be termed "community solidarity" (as opposed to "combat solidarity") (Bayertz, 1998a). This understanding of solidarity in terms of communality then feeds into the societal-institutional understanding of solidarity and transforms into the predominant sociation mode of modern welfare states.

The institution of the family is seen as playing a decisive role in the development of basic solidary attitudes (Höpflinger, 1992). One of the family's key functions is to instil solidarity in children in a range of respects (e.g., normative and affective solidarity). It is argued that, within families, the rigid application of the reciprocity norm is modified by various secondary conditions. According to the "inter-generational stake hypothesis", parents generally invest more in their children than they receive back from them (Giarusso, Stallings, & Bengtson, 1995), and it is only in old age that parents draw on a "support bank" grounded in the parental support the children receive during childhood and youth (Antonucci, 1985). In particular, the term "inter-generational solidarity" implies an optimistic view primarily of ageing multi-generational families (Bengtson, 1996). Intra-family solidarity between generations has various related facets: *structural* solidarity is concerned with opportunity structures (distance between the residences of family generations), *associational* solidarity with the degree of personal contact, *affectual* solidarity with the extent of mutual affection, *consensual* solidarity with the degree of agreement on values and attitudes, *normative* solidarity with the intensity of the sense of commitment, and *functional* solidarity with the provision of assistance and support (Bengtson & Roberts, 1991). If "functional solidarity" is considered solidarity in the narrower sense of the term, the above-mentioned aspects can be conceptualised as pre-conditions for mutual assistance and support (e.g., proximity of homes permits frequent personal contact, which can have a positive effect on the quality of relations, which in turn may influence the extent of mutual support). However, it must be taken into account that societal modernisation processes, particularly the growing trend towards in-

dividuation (Beck, 1986) has led to societal institutions—including the family—being comprehended as fundamentally changeable, transitory, and pluralistic (Backes, 1998a). The family has mutated from a “union born of necessity” (Notgemeinschaft) into an “elective affinity” (Wahlverwandschaft) (Beck-Gernsheim, 1994). Despite social change, the institution of the family is, however, considered highly adaptable. Family sociologists point to the capacity of the family for solidarity under changing societal conditions (Bengtson, Rosenthal, & Burton, 1996).

Societal solidarity, in contrast, has a basis quite different from family solidarity, which is grounded in personal relationships. Societal solidarity implies the expectation that our fellow humans are reliable, that they acknowledge existing norms and the duties to which they give rise, that we can rely on their willingness to cooperate and their commitment to shared interests (Kaufmann, 1997b). “A sense of community prevails over individual interests and goals and their exclusive pursuit. Action is subject to social control through the awarding of respect and contempt” (Gabriel, Herlth, & Strohmeier, 1997, 14). In modern societies, however, traditional community bonds are declining—and with them the sanctioning force of respect and contempt. Individuation permits withdrawal from coercive communities. However, social security institutions, such as old-age protection systems, can also establish moral bonds by creating lifelong continuity and reciprocity (“moral economy”, Kohli, 1987). Moreover, the consequences of societal modernisation can also be interpreted favourably. Individuation and liberation from “unions born of necessity” provide scope for solidary relations to develop voluntarily and without coercion (Hondrich & Koch-Arzberger, 1992).

2.3 Negotiatory Processes on Generational Ties and Generational Relations

In our discussion so far, “generational solidarity” has been depicted as the harmonious domain of (mutual) support between familial genealogical generations or the successive assumption of responsibility of one societal age group for another through social security systems. Solidarity among generations is perceived as being threatened primarily by increasing individuation and a shift of emphasis to selfish utility. But this analysis does not go far enough. It is not a matter of combating unjustifiable egoism but of the legitimation of solidarity, the “sources, justifications, and conditions of solidarity” in the face of demographic, economic, and cultural change (Kaufmann, 1997b). In the course of such change, conflicting demands can be raised and contradictory values set that cannot be dealt with simply by invoking traditional solidary communities.

In view of this situation it seems useful to characterise ties and relations between generations not in terms of the—hypostasised—anthropological universal “solidarity” but rather in those of the less reconciliatory concept of “ambivalence” (Lüscher & Pillemer, 1998). Generational ties and relations are marked not only by mutual support but also by conflict (Lüscher, 1993). Given the societal goal of securing solidarity, this point of departure seems more appropriate than the fiction of exclusively stable support-

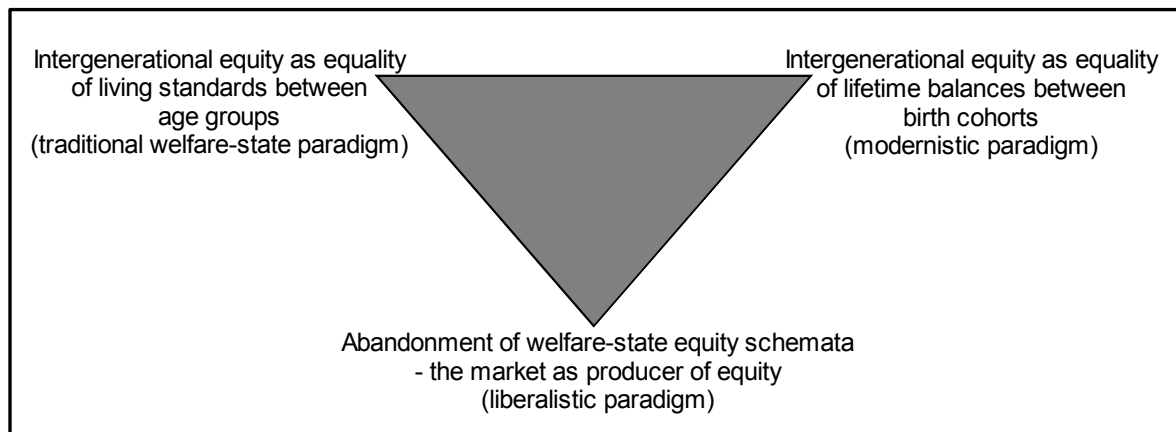
tive bonds between generations. This will be explained on the basis of familial generational ties and societal generational relations.

Familial Ambivalence: The concept of “inter-generational ambivalence”, which has a long tradition in sociology and psychology, has only recently been taken up (again) by family sociologists (Lüscher & Pillemer, 1998). The concept of ambivalence refers to the “double valence” of phenomena. “As a sociological concept, ambivalence is used to describe experiences of and insights into contradictions in action, social structures, individual and societal development in a context of fundamental unresolvability. Ambivalences thus point to the unresolvedness of decisions that are or must ultimately be equivocal” (Lüscher & Pajung-Bilger, 1998, S. 30-31). Ambivalences play a particularly important role in ageing families, for example with regard to conflicts over the compatibility of employment and caregiving (Naegele & Reichert, 1998; Reichert & Naegele, 1999). The question of what form relations between family members take, and—considering the topic addressed here—especially those between ageing (grand)parents, adult children who are now parents themselves, and adolescent grandchildren, can no longer be answered in terms of doubtlessly valid solidarity norms. It is rather a matter of negotiation between individual wishes and inter-generational obligations, between conflicting feelings of attachment and independence, between norms of self-realisation and of social commitment (Lüscher, 2000a). Solidarity between generations is *one* of the solutions found in the struggle with ambivalence, but it is by no means a self-evident solution. The fragmentation of families, as well as problematic, conflictual constellations can also be the outcome of developmental processes in the family. The statement that the vast majority of ageing families are characterised by a high measure of inter-generational solidarity and that only about 10% to 14% of all inter-generational relationships are to be seen as problematic (“long-term lousy relationships“, Bengtson et al., 1996) is a—rather helpless—description, but not a sufficient analysis of the dynamics of family relationships.

Societal ambivalences: At the societal level, too, there are ambivalences in generational relationships. As already indicated, the generational contract is concerned not with “generations” as defined above but with age groups whose composition changes daily through the establishment and termination of employment relationships. People currently in gainful employment pay contributions that are disbursed to retired people as transfers; current contributors expect the group of not yet gainfully employed children and young people to assume future responsibility for contributions. The “generational contract” is thus not a contract but a metaphor to legitimise in social policy terms the constantly shifting relationship between responsibility (contributors) and dependency (beneficiaries) (Göckenjahn, 1993). However, the legitimacy of social insurance systems is being increasingly called into question, frequently with reference to a lack of “generational equity” (Diessenbacher, 1990). Considering not the abstract age groups of the generational contract but specific cohorts or welfare-state generations, it is argued that people born between 1925 and 1955 constitute a “lucky generation” with regard to

provision for old age (Rosenblatt, 1987), which will be followed by a generation less comfortably provided for. The returns on social insurance to be expected by beneficiaries is inequitably distributed among birth cohorts in violation of the generational equity principle (Tremmel, 1997).

Figure 2: Paradigms of Inter-Generational Equity



In the societal discourse a shift becomes apparent between the implicit and explicit norms (Leisering, 1992: 222f) and paradigms (cf. figure 2) of equity that compete in public provision for old age: away from equity as equality in living standards between age groups and towards equity as equality in generational lifetime balances. In this sense, equivalence of contribution and participation also stand side by side as distributional principles in social security old-age protection. The ever-present ambivalence of various equity norms in the old-age protection system affects individuals differently if, as is currently evident (e.g., owing to longer retirement—the result of both earlier retirement and greater life expectancy) the ratio of the retired to the actively employed population changes. For this quantitative shift means that a declining monthly amount is available per pensioner relative to earned income, since the group to which he belongs becomes ever larger. This lowers the living standards of the elderly secured by statutory pensions, although, because the duration of pension payments has on average increased, the return on contributions has not necessarily declined. The equivalence of (working) lifelong contributions and total pension amount is therefore not affected, whilst the norm of equivalence in individual living standards before and after retirement is being successively called into question as is the equality postulate for the living standards of different age groups at a given point in time. Total privatisation of provision for old-age without societal protection would amount to a complete abandonment of social security equity norms. The market would replace social security institutions as the producer of

equitable distribution, and a political or academic discussion on the equitable distribution of resources would become superfluous.

Even if social insurance systems explicitly do not guarantee equal returns or lifetime balances but only relative positions in the income structure, it is clear that violation of the nonetheless immanent norm of (approximate) equality in lifetime balances jeopardizes the legitimacy of social security systems. Solidarity between generations is not unconditional nor to be taken for granted. Responsibility for the (parental) generation and concern about one's own future security in old age can be interpreted as societal ambivalence towards the current problems of social security systems.

2.3 Summary

In discussing the subject of “securing solidarity between generations”, concepts must be clearly defined. Given the fuzzy use of the term generation by politicians and the public a distinction needs to be made, depending on the context, between “age groups”, “cohorts”, and “generations” (in Mannheim's meaning of the term). The metaphor of the “generational contract” is concerned with abstract age groups, whereas the problem of “generational equity” is concerned with specific birth cohorts. What has been said so far has, however, made it clear that solidarity should not be conceptualised as a precondition of social security systems or familial inter-generational ties but as the result of social constructs that depend on various framework conditions, including societal and familial negotiatory processes. It is proposed to regard ambivalences as a fundamental aspect of generational ties and relations.

3. Key Developments over the Past Two Decades

We now consider the extent to which changes in inter-generational solidarity have taken place since adoption of the International Plan of Action on Ageing in 1982. We look at how selected forms of and preconditions for solidarity have changed over the past two decades. First, we deal with the family level (“generational ties”) and then the societal level (“generational relations”).

3.2 The Development of Generational Ties

In this section a number of recent German findings on inter-generational solidarity at the family level are presented. The following areas dealt with are: households, contacts and activities, transfers and instrumental assistance, family support in terms of assistance and long-term care. Given the data situation, however, it is possible only in individual cases to describe the development of familial inter-generational solidarity over the two decades in question.

Living together in shared and separate households: Before discussing multi-generational households, it should be pointed out that most elderly people have chil-

dren. The Age Survey, which questioned a representative sample of about 5,000 people between the ages of 40 and 85 living in private households (Kohli & Künemund, 2000), showed that between 85% and 90% of respondents in all age groups had children. There were marked differences between East and West Germany in the sequence of generations. Because East Germans had their first child at a lower age, 37% of people aged 70-85 in East Germany had children, grandchildren, and great-grandchildren; in West Germany the figure was only 18% (Künemund & Hollstein, 2000, 268). The picture of living conditions, dominated by the one-person elderly household, changes considerably if not only co-residence (two, three, and multi-generational households) is taken into account, but also living in separate but nearby households—for example in the same building or the same locality (Kohli, Künemund, Motel, & Szydlik, 2000). This shows that over two-thirds of people aged 70-85 who had children of their own lived in the same locality as at least one of their children (68%), and that in over 90% of cases one of the children lived no more than two-hours' drive away. Vice-versa, almost half of those aged 40-54 (with living parents) resided in the same town as their parents (or at least as one of their parents), and over 80% live less than a two-hours' drive away. This largely confirms other findings on the basis of which the family has been interpreted as a "network", whose members live in spatial proximity to one another despite maintaining separate households (Bien & Marbach, 1991).

Contacts and activities: A similarly differentiated picture emerges for the frequency of contact between old parents and their adult children. The vast majority of people aged 70-85 had contact with (at least one of) their children at least once a week (86%). Contact in the other direction was also very active. Three-quarters of 40 to 54 year-olds had contact with their parents at least once a week (Kohli et al., 2000). This confirms a finding of the Multi-generational Study (Bertram, 1996): whereas parent-child relations in the early familial phases are dominated by shared activities such as meals and leisure projects, these activities disappear almost completely in later familial phases. Instead, conversation about personal issues and the display and reciprocation of positive emotions crystallise as new, significant domains. Intimate exchanges between parents and children thus begin only after the children have left the parental home; a finding that contradicts the picture of "life in isolation" in old age.

Transfers and instrumental assistance: The Age Survey also inquired about monetary transfers between family members. Of interest were the exchange of material transfers (money, material gifts) and instrumental assistance (work in the household: cleaning, shopping, minor repairs). It appears that support between the generations flows in differing channels. The oldest group of respondents (70-85) supported their children and grandchildren with financial transfers. Over the preceding 12 months money, larger material gifts, or regular financial support had been given to their children by a quarter of parents over the age of 70 and to their grandchildren by 15% of grand parents over the age of 70 (Kohli et al., 2000), while very little material assistance had flowed in the opposite direction. It is quite a different matter with instrumental assistance. A consid-

erable proportion of parents over 70 were supported by their children (22%) and a smaller proportion of grandparents over 70 were assisted by their grandchildren (7%), whereas very little instrumental assistance was forthcoming in the opposing direction. The Berlin Age Study, a representative study of 516 old and oldest/old people between 70 and 104, reports similar findings (Mayer & Baltes, 1996). It appears that 38% of the West German population made material transfers to their children and grandchildren at a substantial annual rate: about DM 4,000 for the children and about DM 2,500 for the grandchildren per year (Wagner, Motel, Spieß, & Wagner, 1996a). The Age Survey reports similar figures (Motel & Szydlik, 1999). A rough calculation including private transfers shows that people over the age of 60 passed on a total of about 6% of their total income and about 8% of their income for the pension systems to third parties (cf. Kohli 1999). This permits two interpretation patterns. First, it could be argued that the elderly have too much money, since they are able to rechannel a considerable part of their unneeded transfer income back to the younger generation. Second, however, it should be emphasised that the elderly make substantial payments to younger age groups. These private transfers are by no means return flows on the principle of share and share alike; they are targeted to more needy children (Motel-Klingebiel, 2000). The Berlin Age Study shows with respect to instrumental assistance that the number of network members who support and help the elderly between the ages of 70 and 90 is increasing markedly, while the number of people who receive help from older people is decreasing (Wagner, Schütze, & Lang, 1996b). The Three Generation Study tends to confirm this (Attias-Donfut, 1995; Attias-Donfut, 2000), concluding that support for the elderly strengthens intra-family solidarity (by means of a “minor generational contract”). The services of the welfare state do not displace familial solidary action; it is rather that a reduction in old-age protection not only jeopardises societal cohesion but also the functioning of familial solidarity.

Support for those in need of assistance and long-term care: The proportion of people in need of help and long-term care grows sharply with increasing age. According to the German Social Code SGB XI (§14), people are defined as being in need of long-term care if, “because of physical, mental or psychogenic disease or disability [they] require help in considerable or substantial measure for routine and regularly recurring tasks in the course of daily life for a duration of at least six months.” This has so far applied primarily to hygiene, mobility, and nutrition; less account has been taken of the need for supervision in the case of mental deterioration in older people. About 1.2 million people in need of care live in private households and about 500,000 in old-age residential institutions. The proportion of people requiring long-term care increases with age. Among people aged 65 to 69 the figure is just under 2%, among those over 85 it is already 28% (Schneekloth, Potthoff, Piekara, & Rosenblatt, 1996). Discussion of the long-term care problem conceals the fact that a considerable number of older people are not (yet) in need of care, but do need help. Help in this sense covers the need for assistance in the household and in social communication. A total of some 2.1 million older

people need household help (Schneekloth et al., 1996). Hitherto, the family has been the biggest and most potent “caregiving institution.” It can also be described as the “discreet service basis” of long-term care insurance (Zeman, 2000). Over 77% of all care receivers have a main caregiver, generally a member of the family (Schneekloth et al., 1996). Only 9% of care receivers obtain no help from relatives, neighbours, and friends. Among the main caregivers, 83% are women, in most cases living in the same household as the care receiver. As a rule they are wives, daughters, or daughters-in-law. In the vast majority of cases (79%) the main caregivers are “on duty” around the clock. In brief, this is the support provided by families, or, more precisely, by women, when long-term care is needed. Familial solidarity has hitherto been largely borne by women: it is women who provide care, and women who, as “kin-keepers” hold families together.

With the introduction of long-term care insurance in Germany, an attempt is being made “to support the willingness of relatives and neighbours to provide care” (§4 SGB XI). First data are meanwhile available on the effects of long-term care insurance (Blinkert & Klie, 1999; Schneekloth & Müller, 2000). With regard to inter-generational solidarity it is important to observe the impact of long-term care insurance on the caregiver network. It appears that long-term care insurance stabilises social support networks. As table 2 shows, no fundamental changes have taken place in the categories of “private caregivers”. Both before and after introduction of long-term care insurance, just under 40% of caregivers have been relatives from the first filial generation (daughters and daughters-in-law, much more rarely sons and sons-in-law). Changes are evident in relation to the inclusion of other relatives, neighbours and friends.

Table 2: Private Caregivers for Care Receivers in Private Households

| | Before long-term care insurance | Currently (data from 1998) |
|------------------------------|------------------------------------|-------------------------------|
| Partner relationship | 37 | 32 |
| wife or partner | 24 | 20 |
| husband or partner | 13 | 12 |
| Inter-generational: parents | 14 | 13 |
| mother | 14 | 11 |
| father | 0 | 2 |
| Inter-generational: children | 39 | 38 |
| daughter | 26 | 23 |
| son | 3 | 5 |
| daughter-in-law | 9 | 10 |
| son-in-law | 1 | 0 |
| Non-nuclear family | 10 | 17 |
| other relative | 6 | 10 |
| neighbour / friend | 4 | 7 |

Source: Schneekloth & Müller, 2000: 52.

Apparently the German long-term care insurance has made little impact on care arrangements. If there is a stable support network, care receivers can now use the money provided by care insurance to establish reciprocity in the relationship with relatives and—to a lesser degree—with friends and neighbours. However, given the 80% of care receivers who assert their entitlement to money payments there has clearly been little success so far in involving professional helpers in familial care arrangements—borne by wives, daughters, and daughters-in-law.

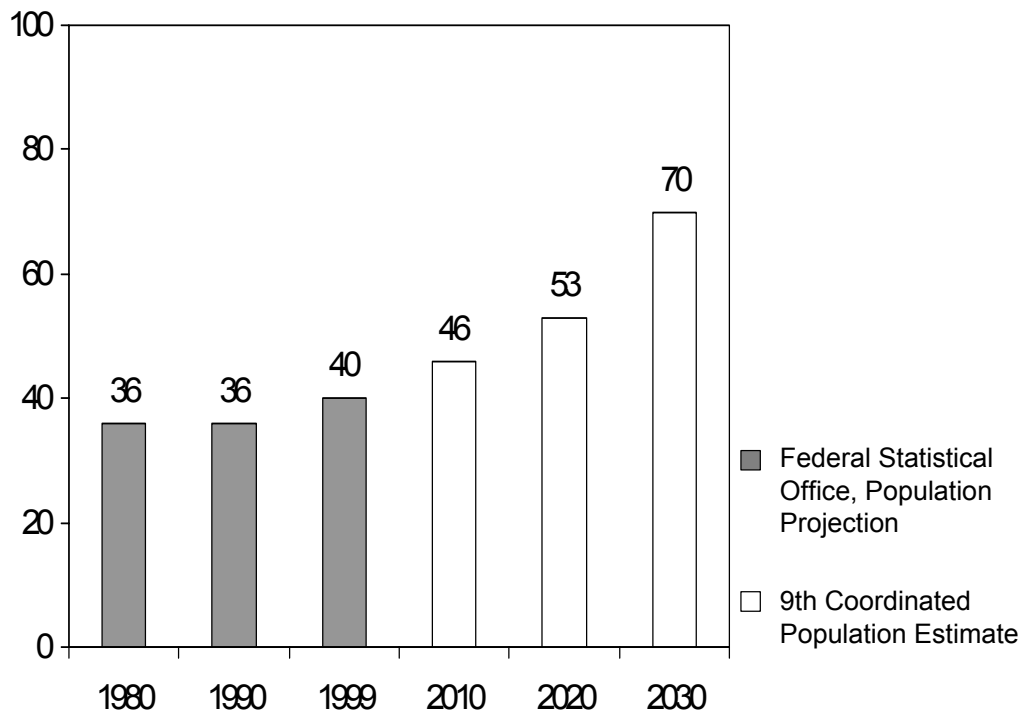
Inter-generational family conflicts: The findings mentioned show that the family can still be “relied upon”. Help flows in various channels between the generations, whose members may not live in the same household, but often close by. In the sense of a “minor generational contract”, members of the oldest generation support their children and grandchildren financially and receive instrumental support from the younger generations. This finding can be interpreted as evidencing a “solidary bond” between the generations. Ties between generations are by and large stable. Apparently “reciprocity from a solidarity perspective” has hitherto prevailed with respect to inter-generational support. Families rely on mutual help, but are not too particular when it comes to offsetting support—at least, not as particular as they would be in a formal setting. And social security systems like pension insurance or long-term care insurance systems appear to support rather than undermine familial solidarity in ageing families.

However, this indication of persisting and stable inter-generational solidarity is not enough. If one understands solidarity between generations as a family service, the ambivalences in inter-generational ties within the family need to be considered. Ambivalences, it can be argued, are built into the structure of the family (Lüscher, 2000b). The family as an institution is caught between reproduction and innovation, and at the inter-individual level, members of familial generations oscillate between the poles of convergence and divergence or dependence and autonomy. First studies show that familial ambivalences can be operationalized in different ways (Lettke, 2000).

When older people become dependent of the provision of care, inter-generational ambivalences become particularly clear. In this context the family appears to transform back from the “elective affinity” to a “union borne of necessity” (Zeman, 2000). To a large degree, it is partners and adult children, especially women (Rossi, 1995; Schütze, 1993), who provide care to older people. As a rule, familial support in the event of dependency is associated with the assumption of heavy burdens and restrictions in the realisation of the carer’s own life plans. An important example of a potential source of conflict in this context is the compatibility of caregiving and employment (Naegele & Reichert, 1998; Reichert & Naegele, 1999). The pressure of time imposed by the need to coordinate working live and caregiving, the lack of understanding among employers and colleagues, and the reduced opportunities for career and further education concatenate into an extraordinarily harrowing stress syndrome. Recourse to the postulate of “filial maturity”— in the course of their adult life children acquire the personal maturity

that permits them to handle the strain of caring for their parents—seems not to resolve underlying conflicts but rather to conceal them, even though relations between adult children and ageing parents can indeed change and take on a new quality. The general social policy setting (e.g., SGB XI) and the development of nursing and social services infrastructures should not relate to the (doubtless existing) resources of familial solidarity but focus on supporting families in resolving ambivalences that arise when responsibility for caregiving is assumed. Only then can the difficult family relationships also be taken into account that result when conflicts cannot be resolved and intra-familial violence occurs (Carell, 1999).

Figure 3: Dependency ratio “60” (number of persons 60 and older per 100 persons aged 20 to 60; until 1990 West Germany, from 1999 all Germany)



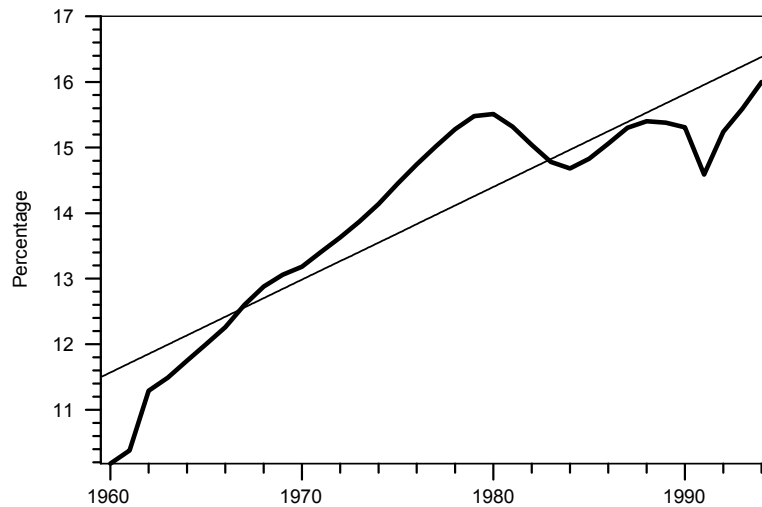
3.2 The Development of Generational Relations

Demographic framework: The framework for progressive demographic change has not altered fundamentally since the International Plan of Action on Ageing was formulated in 1982 (Enquete-Kommission, 1998). This is particularly true of developments in mortality and fertility. Life expectancy at birth (as an indicator of mortality) rose continuously from 1984 to 1993, for both women and men and in both West and East Germany. Birth figures (as an indicator of fertility) developed very differently from the mid-70s in East and West Germany. In West Germany the figure was steady at just un-

der 1.5; in East Germany, in contrast, social policy favourable to families with children brought a brief rise to almost 2.0 in the early 90s and—after the unification of East and West Germany—a sharp decline to 0.7. However, throughout the two decades in question, birth figures were below a level that would have decisively changed the age structure of the population. Migration (especially for West Germany) was extraordinarily variable over the past twenty years, with most years showing a positive balance between immigration and emigration. Over the same period, the age structure has changed considerably (figure 3). The dependency ratio in 1980 and 1990 was about 36%, rising to 40% in 1999; according to the 9th Coordinated Population Estimate a further rise in dependency ratios of up to 80% by 2050 can be expected (Statistisches Bundesamt, 2000).

However, this development is only an excerpt from a long-term trend (figure 4), for the proportion of people aged 65 and above in total population grew from around 10% in 1960 to about 15% in the mid-90s. The 80s were an exceptional period in this respect. Stagnation and even brief declines in the proportion of older people occurred at a point in time when the birth cohorts that had been particularly strongly decimated in the Second World War reached 65.

The demographic framework of inter-generational solidarity has not changed fundamentally in the past twenty years. Marked rises in the proportion of older people are recorded until the end of the 70s and can apparently be expected in the future. And future demographic age structures—because of the inertia of demographic change—are essentially foreseeable.

Figure 4: Proportion of persons aged 65 and above in total population in Germany

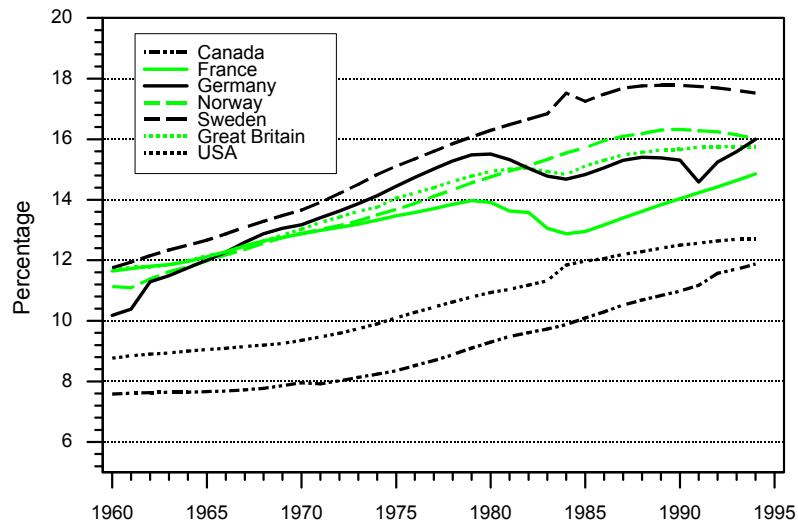
Until 1990 West Germany inc. Berlin (West), from 1991 all of Germany.

Source: OECD, Comparative Welfare States Data Set (Huber, Ragin & Stephens, 1997).

Source: Motel-Klingebiel, 2000.

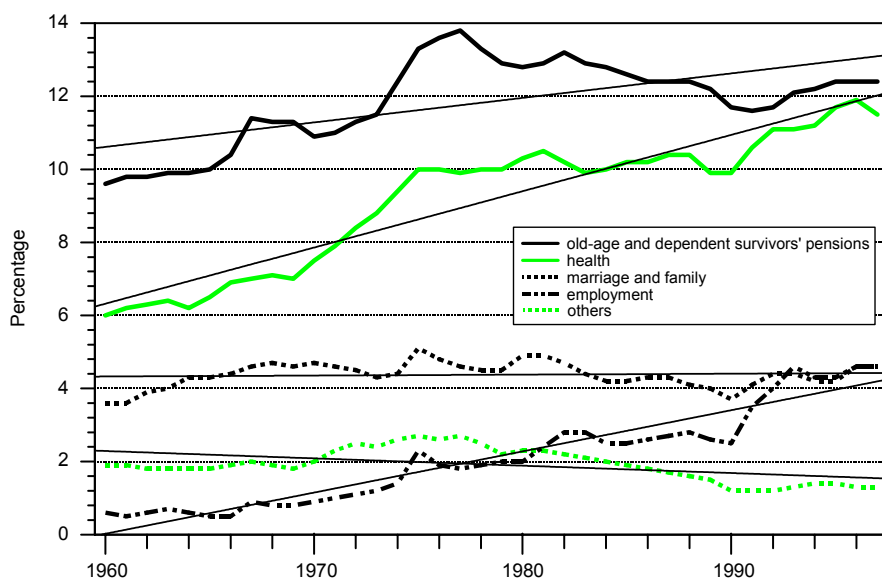
Considering the development of the proportion of people over 65 in total population in comparison with other countries (figure 5), a high degree of homogeneity in demographic development is apparent. Most societies record a constant increase in the proportion of older people. This trend was interrupted in Germany and France by the consequences of the Second World War, which as a period effect impacted population structure (see above). Similar period effects should be apparent in eastern Europe, as well, especially in the countries that formerly constituted the Soviet Union. A second breach in the trend in Germany is evident after 1990 owing to the expansion of the survey population to include the population of East Germany, on average a little younger. There are differences in level particularly between the United States and Canada on the one hand, whose development is apparently somewhat delayed, and, on the other, European societies, which record very similar proportions over time (cf. Motel-Klingebiel, 2000).

Figure 5: Proportion of people 65 and above in total population in selected societies



Until 1990 West Germany inc. Berlin (West), from 1991 all of Germany.
 Source: OECD, Comparative Welfare States Data Set (Huber, Ragin & Stephens, 1997).
 Source: Motel-Klingebiel, 2000.

Figure 6: Specific social security benefit ratios—benefits as % of GDP in Germany



“others“ = consequences of political events, housing, savings promotion general social support.
 Until 1990 West Germany inc. Berlin (West), from 1991 all of Germany.
 adapted from: Federal Ministry of Labour and Social Affairs, 1998: Table 7.2.
 Source: Motel-Klingebiel, 2000.

Generational solidarity and old-age protection: In the discussion on old-age protection, the so-called “dependency ratio” has been of considerable importance. The ratio of younger to older persons is often cited as proof of the “unaffordability” of the current “pay-as-you-go” procedure in providing for old-age—and the demographic develop-

ments described above are accordingly taken to mean that welfare-state old-age protection systems are in crisis. But if we look at the social security benefit ratio—i.e., benefits in the field of old-age and surviving dependents' pensions, health, marriage and family, employment, etc. (we sum the areas "housing", "savings promotion", "general social support", and "consequences of political events") and their share in GDP—the development of old-age protection systems since 1960 does not look so alarming to date (figure 6). Spending on health has increased a great deal more. This does, of course, also have to do with demographic change. Spending on employment has also increased more strongly over this period than on old-age protection.

In comparison with demographic changes, the development of the social security benefit ratio can be described as moderate. The increase in the proportion of older people is greater over the period under study than the rise in specific social security benefit ratios (cf. Motel-Klingebiel, 2000). No dramatic rise in the cost of old-age protection owing to demographic change is apparent in comparison with economic developments, as is often claimed in the current debate (and despite the heavy burdens incurred by the statutory pension insurance system in the course of German unification). Diagnoses of crisis based solely on demographic developments are short-sighted. The quantitative development of old-age protection is also determined in strong measure by other, particularly economic and social policy factors.

Despite the present discussion on the system of German old-age protection it should be remembered that the State will have to continue to assume (co-)responsibility for appropriate provision for old age, for example as guarantor in the event of declining yields of an old-age protection system on a fully funded basis (Leisering, 1992)—not least of all to maintain the confidence in the system that is a precondition for every security system (Leisering & Motel, 1997). Attitudes towards the role of the State in safeguarding pensions could therefore serve as an indicator of generational solidarity.

The relevant attitudes were recorded for 1985, 1990 and 1996 by the "International Social Survey Program" on the basis of representative samples in a number of Western countries (the East German *länder* were included for the first time in 1996). Respondents were requested to state whether the government should spend more or less in a number of areas, including pensions. Remarkably, it was explicitly pointed out to respondents that higher government spending could mean higher taxes. The data for Germany, Italy, Britain, and the United States are given in table 3 (International Social Survey Program, 2000).

Despite the marked differences between countries and survey date, it is apparent that cuts in government spending on old age protection was approved of by only a small minority at all measurement points. In European countries spending cuts were approved at almost all measurement points by fewer than 5% of respondents. Only in the United States, where a lively debate on "inter-generational equity" is course, is the figure a little higher, between 10% and 15%.

There are, however, greater differences on the question whether government spending on pensions ought to remain at the present level or be increased. On this issue a majority in Germany (West) tended to be in favour of spending stability, while in all other countries the majority of respondents approved the statement that pension-related government spending be increased. Finally, no clear time trend is apparent (although a time series with three measurement points should be cautiously interpreted). In Germany and Italy, approval of the statements “spend very much more or somewhat more” increased between 1985 and 1990, but declined again in 1996. In that year, approval in Germany (East) of an increase in spending was, in contrast, much higher than in Germany (West). In Britain and the United States, on the other hand, approval of these statements remained stable at a high level for all three measuring points, and in the United States a continuous rise was even recorded.

Table 2: Attitudes towards government spending on pensions

| | D/West | | | D/East | GB | | | I | | | USA | | |
|--|--------|------|------|--------|------|------|------|------|------|------|------|------|------|
| | 1985 | 1990 | 1996 | 1996 | 1985 | 1990 | 1996 | 1985 | 1990 | 1996 | 1985 | 1990 | 1996 |
| Spend very much more or somewhat more | 46.4 | 54.9 | 44.4 | 59.6 | 75.2 | 80.5 | 67.8 | 75.1 | 81.3 | 80.0 | 43.6 | 48.5 | 50.8 |
| Maintain spending at the present level | 49.7 | 42.7 | 50.7 | 38.2 | 20.5 | 16.9 | 24.9 | 23.7 | 17.4 | 19.1 | 42.4 | 41.6 | 39.3 |
| Spend less or very much less | 3.9 | 2.3 | 4.9 | 2.3 | 4.3 | 2.6 | 7.4 | 1.2 | 0.8 | 0.8 | 14.0 | 9.8 | 10.0 |

Source: ISSP 1985, 1990, 1996.

The implications of these findings are that (a) the preconditions for societal generational solidarity do not appear to be at risk. This is remarkable in view of the vehement public debate that has been going on in Germany for a number of years now. (b) An increase in government spending on old-age protection is considered unnecessary by a majority of West Germans. Given the high level of material security in old-age, this is quite understandable. (c) The favourable attitude towards old-age protection can be explained in terms of perspective adoption: younger people, too, can think about their own coming old age or that of their parents for whom they have a sense of obligation. For old-age protection concerns dynamically changing age groups and not only an isolated generation (“the aged”, “the greedy geezers”). (d) In view of potential conflicts about problems that have already arisen as a consequence of demographic change and which are highly likely to intensify, it seems necessary for political actors to handle (existing) generational solidarity with care as the precondition for the functioning of old-age protection (Leisering & Motel, 1997), in order to conduct an objective and balanced discussion on issues that affect people in all phases of life (Schmähl, 1999).

Inter-generational societal ambivalence: Despite the apparently quite strong approval of government—and ultimately societal—responsibility for protecting pensions, the issue of generational equity¹ is currently a subject of debate (cf. Sudhoff 1995). Two examples can illustrate the reproach of the “generational inequity” of present social security arrangements. (a) While the proportion of children among the poor population in welfare states rose, the proportion of older people in the poor population fell (Möhle, 1998). Whether there is a causal connection has been questionable at least since the controversy between Easterlin and Preston in the 80s, even if the empirical evidence is clear (Motel-Klingebiel, 2000). (b) A number of indicators show that a “welfare generation” will be followed by a generation that will on average earn a lower income than its predecessor, not only during the gainful employment phase, i.e., at a younger age (Motel-Klingebiel, 2000), and which will probably be worse off as regards old-age protection, too (Conrad, 1990). To settle the question whether these inequalities constitute violations of generational equity, it is proposed to draw a distinction between period problems, age-group problems, and cohort problems (Sackmann, 1998). *Period problems* (e.g., economic crises) can lead to great inequalities between generations, but, in so far as they are inadvertent (“fated”), they cannot be interpreted as a problem of equity. *Age group problems* can, for example, occur when members of younger age groups contribute more to a social security system than they receive from it (e.g., health insurance). But if the members of the (current) net contributor cohorts themselves become net recipients in the course of their lives, there would likewise be no problem of generational equity. *Cohort problems*, however, can lead to inequalities between generations if there are age group differences concurrent with structural changes (e.g., if the net return of the younger cohorts were to be lower than that of an older cohort owing to structural cuts; structural cuts can become necessary because of demographic change, high unemployment, and/or a large number of early retirements). Whether this is also a question of inequity needs to be discussed separately.

Moreover, it should be remembered that “social justice” covers not only the question of generational equity but also that of age-group equity. An important achievement of the (German) pay-as-you-go social insurance system has been to establish distributional equity between age groups. To avoid discriminating against ageing people on grounds of age, pensions were designed as substitute wage payments (Leisering, 2000). On the other hand, the development of disbursement levels was coupled with changes in income from gainful employment, so that the retired could share in the development of affluence. This aspect of social old-age protection is important because, in old-age, people are much less able to achieve lasting improvements in their socio-economic situation than in earlier phases of their lives (cf. Wagner & Motel, 1998).

¹ In examining the inter-generational (in)equity of old-age protection systems in view of demographic change, a number of secondary conditions have to be taken into account that render general statements difficult (Sudhoff, 1995).

Considering these aspects together, it is clear that the problem can be only inadequately described in terms of the solidarity concept. The competing interests of age groups and of cohorts can be understood as an expression of inter-generational ambivalence. Societal debates about the preconditions and effects of welfare-state systems will (need to be) conducted now and in the future. It should, however, be remembered that the critical questioning of their effects can endanger the legitimacy and acceptance of social security systems as a whole. And social insurance systems need to remain stable over long periods if they are to function adequately. It therefore seems useful to introduce standard obligations with the rank of constitutional rights, which would guarantee both basic social rights and procedural norms for the adjustment of public social security systems (Leisering, 1992). This framework is necessary to resolve the ambivalences described, and in reforming social insurance systems to find arrangements that involve neither age-group nor cohort problems, or which at least alleviate the tension between the competing norms (on the details of adequate cohort components like pension ratio and variable standard retirement age, see Sackmann, 1998).

3.3 Summary

At the present time, some 20 years after adoption of the 1982 Vienna International Plan of Action on Ageing, ties and relations between generations are (still) determined by solidary bonds. At the family level, inter-generational assistance and support remains part of everyday life. At the societal level it finds expression in the existing institutions of inter-generational redistribution—above all social security old-age protection—and in the attitude of individuals towards old-age protection. However, this inter-generational solidarity should not be conceptualised as all too harmonious. Inter-generational ties are fundamentally characterised by intensive negotiatory processes (cf. also the scenarios of increasing conflicts vs. increasing solidarity in Bengtson & Schütze, 1992). In family ties between adult children and ageing parents, for example, such negotiatory constraints are apparent with regard to familial assistance, support, and caregiving. The assumption of responsibility for parents in need of assistance and care can collide with the children's own life plans. At the societal level, (currently) younger people are fully aware that, although the (currently) older are guaranteed protection in their old-age, this is not necessarily the case for themselves when they reach old age. Inter-generational ambivalences must be processed at both the family and societal levels. Opportunities and appropriate framework arrangements must be provided for this purpose, so that dealing with such ambivalences do not endanger solidarity but constitute an opportunity for the further development of inter-generational ties and relations.

4. Principles for the Assessment of the Current Situation

By what principles can the present situation be judged? Is “generational solidarity” strong? Or is stronger generational solidarity conceivable? So far these questions have tended to receive only implicit answers. However, they can be explicitly answered only if goals have first been set. Goals are ultimately set as decisions taken in formulating political demands and objectives. The coming section discusses criteria for assessing the quality of generational ties and relations. Proposals for indicators are then made.

4.1 Goals for the Development of Generational Ties and Relations

(a) *Generational ties*: Goal setting with regard to the quality of generational ties can be illustrated by looking at the case of people in need of assistance and long-term care. If the goal is for the family to bear the main responsibility for dependent relatives, a high proportion of home care arrangements would be an indicator of solidary generational ties. However, if the goal is a “care mix” (Evers, 1993; Klie & Schmidt, 1999), within which the family, non-residential care services, and social services share responsibility for caregiving, other indicators would be needed (e.g. the degree of contact between generations and the quality of personal relationships). Precisely in elaborating criteria for “good” generational ties, it is useful to ask whether traditional harmonious generational ties ought to determine goal setting without considering whether other options ought not to be looked at in assessing generational ties. The studies mentioned on the subject of “inter-generational ambivalence” offer an example. They discuss not only “solidarity” but also “emancipation” (as the development of an innovative family association with strong inter-individual affection and convergence) as a solution to the ambivalence situation (Lüscher, 2000a; Lüscher, 2000b).

(b) *Generational relations*: At the societal level, one goal in promoting relations between generations could be to obtain a high level of acceptance of the pay-as-you-go social security system for old-age protection. However, this goal is not uncontroversial in the policy debate. Advocates of the fully funded system could argue that private provision for old-age requires no commitment to solidarity, since fully funded old-age protection is based on an individual contract entered into by each insured person.

Disregarding the soundness of this argument for the moment, this general goal would indeed render the welfare-state observation of generational relations superfluous (on the analysis of private fully-funded social insurance systems see Leisering, 1992, 175-188). But here, too—once again in connection with the keyword inter-generational ambivalence—goals should be extended. Generational relations cannot be determined by a solidarity norm alone; they must integrate the various equity aspects of the pay-as-you-go arrangements (cf. also Leisering & Motel, 1997).

4.2 Formulating empirical indicators

In assessing generational ties, the aspects mentioned above need to be systematically examined: (co-)residence, contact and shared activities, assistance and support, transfers, the quality of relationships. To these aspects should be added conflicts and problems within familial generations. One excellent point of reference is the “Age Survey”, designed as a social reporting instrument (Kohli & Künemund, 2000).

In assessing generational relations, not only economic indicators need to be taken into account but also *attitudes* towards cross-generational social insurance systems. It is important to pay attention to methodological aspects in recording attitudes (e.g., pre-set statements or the formulation of questions can have a considerable influence on empirical results). Not only specific attitudes but also fundamental values and individual preferences need to be recorded. Fundamental *values* provide the framework within which attitudes towards generational relations arise. But individual *preferences*, too, should be taken into account. Values and individual wishes may diverge. And, finally, account should be taken of *knowledge* about institutions and social insurance systems, since this is also an important precondition for evaluating generational relations. In any case, not only should approval of existing systems be recorded, but also—in a suitable manner—diverging standpoints and criticism.

5. Recommendations for Action on Policy and in Society

The above remarks on goal setting and assessment criteria also apply with regard to recommendations for action. Proposals for intervention and action require the prior formulation of political demands and objectives. This is particularly true for an international plan of action covering a wide range of welfare-state cultures. This section discusses a number of proposals, in which not only solidarity in familial generational ties and the functioning of the “generational contract” (in the sense of social insurance systems), but also, broadening this perspective, the productive handling of inter-generational ambivalences are advanced as desirable goals.

5.1 Supporting generational ties

(a) *Strengthening private networks*: It seems to be necessary to support private networks in recognition of the “minor” generational contract (financial transfers from old to young, instrumental assistance from young to old). In this context and despite the continued importance of familial descent relationships, the multitude of existing family forms and other close, non-familial relationships should be taken into appropriate account.

(b) *Removing moral pressure from families*: The support and care of old people remains primarily the job of the family. But the ambivalences of generational ties need to be recognised at the policy level, too. Caregiving must (and can) not always be assumed by families alone. It should not be the task of public policy to support corresponding norms by corresponding social policy arrangements, but to strengthen new forms of inter- and intra-generational support. Threatening overload in the context of familial caregiving should be absorbed in time in the interests of all concerned.

(c) *Information and counselling*: Although social policy measures to support families have been introduced, the families concerned either do not know many of the sources of help, or evaluation of their quality is impossible or limited owing to a lack of information. To correct this state of affairs, institutions need to be established in greater number to meet family needs for information, for example if the need to provide support and care arises. In particular, the increased use of “combi” benefits provided by long-term care insurance should be considered, which, however, presupposes that clients of care services have the information necessary to make the appropriate decisions.

(d) *Strengthening gender solidarity*: In view of the fact that women are the prime “kin-keepers” and caregivers, suitable measures should be taken to encourage men to take on such activities (for the discussion on this subject see Backes, 1998b; Dallinger, 1998; Finch, 1993; Krüger & Born, 2000).

(e) *Modifying long-term care insurance*: Current problems in long-term care insurance should be resolved in the sense of providing better support for families. It should, for example, be considered whether master budgets should not be made available to carer families (as in the Netherlands), which would permit greater flexibility in cost planning and care arrangements. Deficiencies in social care, particularly of older people suffering mental deterioration, could be countered with new solidary living arrangements such as residential groups. The introduction of low-threshold counselling and assistance services should be intensified to help prevent the occurrence of permanent dependency.

(f) *Promoting extra-familial generational ties and intra-generational support networks*: Present contacts between generations take place largely in the family and at work. To improve societal cohesion, promoting extra-familial generational ties, too, seems useful. Places, facilities, and opportunity structures are needed that offer sufficient scope for young and old to meet and opportunities for civic commitment. Successful examples of such extra-familial, inter-generational facilities are contact and knowledge exchanges, citizens’ advice bureaus, contemporary witness exchanges, and “natter cafés” (Hammer, 1997; Lotz, 1999).

5.2 Influencing Generational Relations

(a) *Reporting*: It seems necessary to keep the social and societal situation of different age groups and cohorts under continuous observation. This permanent observation should focus on quality of life (objective and subjective indicators of welfare), the structure and development of generational ties and other social networks, as well as norms of inter-generational ties and the development of generational relations. For this purpose it is necessary to institutionalise continuous, targeted social reporting on a cross-sectional and longitudinal basis (Niederfranke, 1996; Schupp, Habich & Zapf, 1996), which would not only look at the national situation but also assess criteria for evaluating developments in comparison with other countries, as well as analyse problem-solving strategies with regard to policy intervention

(b) *Adapting social insurance systems*: The German social insurance system, like the social security systems of most modern societies, is highly complex. Acceptance of the system needs to be enhanced by clarity, transparency and comprehensibility. This can be obtained by appropriate advisory facilities, but also by the regular disclosure of claims on social insurance among younger (contributing) insured. Finally, necessary adjustments to demographic change should be introduced not ad hoc but in conformity with the system, in comprehensible form, and with long-term calculability—because of the long-term perspectives of every type of old-age protection, confidence in the system feeds to a not inconsiderable degree on the reliability of the structures and services of the formal regulatory system.

(c) *Societal discourse*: it seems necessary to engage in an open societal discourse on rights and duties, on the life planning and lifetime balances of young and old, and on the distribution of benefits. Attention should be paid to avoid poisoning the societal atmosphere by horror scenarios and damaging the legitimacy of institutions established by public policy.

(d) *Basic social rights*: It seems useful to adopt the basic rights discussed at the European level, which take account not only of personal and political rights but also basic social rights (BMFSFJ, 2000). The proposed basic rights charter also takes appropriate account of the rights of age groups and generations, thus setting “standards” for social policy in European countries. This would involve a commitment to (mandatory) minimum standards needed in any discussion of social policy objectives.

6. Implementation Strategies in the European Context

A comparison of implementation strategies in European countries is discussed in detail in a separate expertise (Bernd von Maydell & Bernd Schulte: “Generational Relations with Particular Attention to Social Security Developments”). It is primarily a systematic

comparison of member states of the European Union with regard to old-age protection and welfare care (Eisen & Mager, 1996; Maydell, 1999; Zacher & Mager, 1991). A review of family responsibility for older relatives—dealing with legal obligations, familial solidarity, and the structures of social security services—has recently appeared (European Committee for Social Cohesion, 2000).

However, reviews of this type need to be supplemented by studies on the relationship between social security arrangements and services and generational relations from a comparative cultural perspective (Motel-Klingebiel, Kondratowitz, & Tesch-Römer, 2000). It can be assumed that in European countries—despite the desired convergence in the European Union—there are still considerable differences with regard to societal processes of change and social policy arrangements for old age. Familial cultures concerning inter-generational ties, forms of social services, and the production of mixes adequate to the problems to be solved between private and public, familial and market-organised service areas still diverge in Europe. Theoretical and empirical investigation is therefore needed into how social security and market-driven services and private support systems influence integration and the quality of life in old age as well as inter-generational ties in the family. Comparative cultural studies will provide insight into the possibilities for implementing social policy strategies in regions with diverging family cultures and different social security regimes.

7. Prospects

Despite the findings of social science studies, the ongoing political discussion diagnoses fundamental disturbances in generational solidarity. Reference is not seldom made to distant historical epochs in evoking an organic solidarity between generations perceived as having been lost in the course of modernisation and individuation. However, historical and social-anthropological research (Ehmer, 2000; Kondratowitz, 1999) has shown that inter-generational ambivalences are not the “invention” of modern or post-modern societies. Reliable and stable support between generations was by no means uncomplicated and taken for granted in other cultures and other times. It also came into being in a context of—sometimes fierce—negotiatory processes. The thesis of the societal loss of status of the elderly in modern times can be countered by the thesis that present-day generations of older people can live to an unprecedented degree in an economically secure and societally stable situation—and that, at least in Western, highly industrialised societies, future generations, too, can expect to experience a comparatively secure and positive old age. And, finally: “The vicissitudes of history have always produced favoured and less favoured generations” (Leisering, 2000). In view of the affluence of our society, this historical perspective might help us discuss inter-generational ambivalences, demographic change, the “age burden,” and generational (in)equity more dispassionately.

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