

## **LILIANA SOUSA: INTERGENERATIONAL SOLIDARITY: BRINGING TOGETHER SOCIAL AND ECONOMIC DEVELOPMENT**

### **Introduction**

The topic of intergenerational solidarity emerges associated with (and is inseparable from) population aging (Newman et al., 1997). Population aging starts by being viewed as a “social problem”, as it undermines the sustainability of social protection systems (Harper, 2005). The acknowledgement that it is also an achievement meant that it started to be referred to as “social challenge”: it is desirable to live more years, but it requires the restructuring of social systems in order to cope with the increase in the proportion of non-working (aged) population (Harper, 2005). In this paper we propose to discuss population aging as an “opportunity for social and economic development,” arguing that solidarity between generations can be the operational tool of that opportunity.

Intergenerational solidarity is defined by the connection and exchange between generations (Tobio, 2010). It is consolidated at a micro level (several generations of a family) and at a macro level (beneficiaries, inactive generations, versus taxpayers, the active generations) (Walker & Fong, 2010). Therefore, intergenerational solidarity is developed in the private sphere of family and community relationships and in the public sphere of social policies. And it has been mostly described by its scarcity (Figueiredo, 2007; Hareven, 1996; Sousa, Figueiredo & Cerqueira, 2004): at a micro level by the abandonment of the older persons, and at a macro level by the inability of the active population (taxpayers) to ensure the social protection of the non-active (beneficiaries).

Our proposal is that social and economic development is no longer seen through the old paradigm of investing just in the education of young people (Walker & Fong, 2010). This should be a paradigm of the past, which made sense when the proportion of older people was lower. The time has come to adopt a more integrated approach of ages/generations to build policies and programmes of social and economic development by adopting an intergenerational perspective. Our proposal is to combine inter and intra-generationality with social entrepreneurship, based on the need to set the welfare of all citizens and communities as the aim of society, i.e., economic development not as an end in itself but a contribution to the greater goal of well-being.

Solidarity between generations: meaning Intergenerational solidarity has been described and defined in different ways, but the concept can be summed up in two ideas (Tobio, 2010; Bengtson, 2001): connection and exchange between generations. The connection is what keeps generations together, highlighting interaction and mutual support; exchange refers to what generations give to and receive from each other. However, it goes beyond reciprocity (the equivalence between what we give and receive), also involving altruism.

### **Intergenerational solidarity occurs at the micro level (family) and macro level (society).**

At a micro level it refers to several generations of a family (great grandparents, grandparents, parents, children), who provide support over the role changes that characterize individual and

family development. Usually (Tobio, 2010): each generation receives twice in life (from parents as children; from adult children when older), and each generation gives twice (first to the children and then to the old parents). At a macro level it refers to the distribution among the adult and active generation who pay taxes, buy services and share their time with other inactive generations (beneficiaries) (Tobio, 2010).

Thus, interpersonal relationships in the family (micro level) are interrelated with social policies (macro level). And the macro level of policy and values organises the context of interpersonal relationships, indicating “normal” and acceptable individual and family behaviours and creating rules for family relationships.

Solidarity between generations has been addressed mainly from the perspective of its scarcity, absence or difficulty in contemporaneity (Walker & Fong, 2010; Figueiredo, 2007): i) emphasizing its absence or reduction at the micro level (family and community); ii) focusing on the difficulty of social policies in maintaining solidarity in terms of the Welfare State due to population aging. It is necessary to question these preconceived ideas so that solidarity between generations can be an opportunity for social and economic development.

#### **Micro level: the myth of decreased solidarity among generations**

Political, social and media discourse has focused on the absence or reduction of intergenerational solidarity, reported by cases that show: abandonment of older parents by adult children; older people who die at home alone without being noticed; isolation of older people; abuse, neglect and maltreatment. It is a fact that these cases exist and require a response that will restore dignity to these citizens' lives. Nevertheless, there is consistent evidence, in Portugal and internationally, that families continue to have a central role in the lives of members of all generations, including the elderly (Harper, 2005; Figueiredo, 2007). It would be naive to assume that all families provide the best care for their older members.

However, research shows that (Harper, 2005; Figueiredo, 2007): 80% of the elderly are cared for by their families.

It is then necessary to understand why this myth of absence of intergenerational solidarity within families and communities arises today.

This myth emerged in the 1970s, when some sociologists began to debate the alleged breakdown of social ties and the “death” of social solidarity (Attias-Donfut & Rozenkier, 1996; Vicente, 2010). This perspective is anchored in the understanding of the family under the double perspective of kinship and co-residence (Segalen, 1999; Vicente, 2010). That is, intergenerational solidarity exists when a group of “nuclear families, genealogically linked together, share a home” (Bernardi, 1992, p. 290).

This myth argues that intergenerational solidarity existed in families of the past (numerous and cohabiting), assuming that there is a conversion in contemporary families to the nuclear form, as a result of the functional needs of the industrial economy, which promotes the lack of solidarity between generations (Fuster, & Ochoa, 2000; Vicente, 2010).

However, research does not back up this myth, because historical analysis provides evidence that domestic groups of the extended family have never been the norm, neither in the

Portuguese context, nor in the rest of Europe (Wall, 2005; Vicente, 2010). Several authors (Ariès, 1988;

Vicente, 2010) consider that this only happened in times of uncertainty, when families were forced to replace public authorities due to legal or economic situations. Ariès (1988) traced the origins of contemporary (nuclear) family to the Middle Ages through an iconographic analysis and realised that images showing families with more than two generations were rare. Probably the historical perspectives of the past with the extended family living together were influenced by the experiences, concerns and prejudices of the present. That is, as noted by Freud (Freud, 2007; Vicente, 2010), it is inevitable that the story is an expression of the beliefs and desires of the present, rather than an actual picture of the past, as many things are passed on by memory and even distorted. These data limit the dichotomy between family of the past and family of the present, which is not to ignore the significant changes that have occurred.

Solidarity between generations has also been discussed in terms of connection versus separation from the family of other social systems (such as neighbours). Sussman (1988) in "The isolated nuclear family: Fact or fiction?" concludes that the appropriate response is "fiction". Sussman (1988) questions the vision of the nuclear family disconnected from the extended network. He argues that family ties forged between generations have a decisive influence on family processes and that the nuclear family, far from being isolated, is integrated into a network of mutual assistance and activity. Therefore, research shows that there is solidarity between generations at the micro level, though little recognized, because visibility is greater in cases where it does not exist (consistent with the trend of the media to broadcast only bad news).

#### **Macro level (social policies): alternatives to the welfare state and individualism**

Social policies, especially retirement, social care and health policies, have been based on the renewal of generations, i.e. the active adult population pays taxes, allowing the non-working population or socially disadvantaged to receive social support; later when that generation is no longer active (retired), it will benefit from the taxes paid by the new active generations (Harper, 2005; Walker & Fong, 2010). However, especially in the last three decades, the impact of population aging inhibits this model and it requires reformulation.

In this context, the Western welfare states (where population aging is more pronounced and policies are based on the assumptions above) have been restructured to meet the projected increased costs of a growing elderly population (non-active). For example (Harper, 2005; Walker & Fong, 2010): several EU countries have altered pension systems to limit public spending and increase individual responsibility; Australia reformulated the traditional state pensions by limiting eligibility. Three arguments underlie these changes (the welfare state to market orientation and individualism) (Walker & Fong, 2010): a pessimistic view of population aging; an emphasis on family responsibility; challenges of globalization.

Policies in Western industrialized countries tend to take a pessimistic view of population aging (social problem or challenge), focused on increasing public spending. Hence the concern with this group described as economically dependent and unproductive. Politicians argue the need to efficiently manage public expenditure and emphasize that using "generous" social security

can impede economic growth. They adopt the economic-demographic imperative to legitimize policies to reform the welfare state that promote the focus on individual resources and relatives (Walker & Fong, 2010).

The emphasis on family responsibility has been a common slogan, because, from a political perspective, care and support amongst generations are assumed to be “natural” obligations of the family. As a rule, adult children have a legal obligation to care for their parents (Walker & Fong, 2010) (e.g., France and Portugal), although some countries (such as the UK and Scandinavian countries) have already eliminated this legal responsibility (for example, it is difficult to argue that the children have a legal obligation to take care of a father who was abusive during their childhood). This assumption of the family as the natural and legal place to care for the elderly implies that policy measures provide little financial support and services to the caregiver families.

Thus, there is a responsibility and social burden on families, but they are not given adequate support to take the best care of their older members; for example, in Portugal a couple with a child, where both members of the couple work and receive a combined salary of about 2000 euros (which is common), they can take care of an older parent (with a pension of about 400 euros), but neither one of the couple may stop working, so the old parent may be alone during the working day time.

These trends or political options are associated with the challenges of globalisation, leading politicians to see economic competitiveness, in ideological and practical terms, as a priority in relation to social support.

That is, the alarm about fiscal pressures resulting from the “burden” of economic dependence on future generations as regards pensions, health care and social costs is amplified, and seen as a threat to the sustainability of the welfare state. There is also an emphasis on concerns with high levels of taxes which will lead social states to lose global market competitiveness (Walker & Fong, 2010).

Therefore, the macro level reinforces the images of the micro-level: the older are hampering aid to the young and economic development; and, at the same time, the younger are expected that take care of the older. Moreover, this policy path sets economic development as the goal, when the goal should be the well-being of citizens and communities; while economic development should be an instrument for that well-being.

### **Social and economic development: From a focus on youth to the integration of generations**

The end of the twentieth century and early twenty-first century show a world that is increasingly diverse and complex as a result of various changes (such as decreased birth rate, increased life expectancy, greater involvement of women in professional careers, greater mobility of families) (Bostrum, Hatton-Yeo, Ohsako & Sawano, 2000). This context requires changes of various paradigms.

It is noteworthy that the solution is never at the level of the problem, i.e. the problem or social challenge of an aging population and consequent failure of social protection systems will not

find a solution in doing “more of the same” (i.e., raising taxes and reducing support for families).

This is the level of the problem; the solution has to be on another level, and our proposal is to look at the aging population as an opportunity for social and economic development and at intergenerational solidarity as the instrument.

When thinking about social and economic development one still tends to be tied to the old paradigm of investing just in education/training youngsters (Walker & Fong, 2010). This should be a paradigm of the past, which emerged and made sense in a time when life expectancy and the proportion of older people was lower. We currently have a multigenerational social scenario, and it is essential to find the potential of this new configuration. We think the time has come to adopt a more integrated approach of ages/generations to build policies and development programs, as shown in the Madrid Plan of Action (2010-2012): to adopt an intergenerational perspective in policies of social and economic development. The gains will be greater if: i) we spend less time thinking about the costs of an aging population, and ii) we invest our efforts in the development of social and economic opportunities arising from the prolongation of life and multigenerationality.

The policies and programs based on the intergenerational approach should promote essential interdependence between generations and recognize that all members of society have contributions and needs. In 2007, the European Commission encouraged member states to establish renewed solidarity between generations, to confront demographic changes in Europe. According to the Eurobarometer (2008), 85% of EU citizens consider it important to use financial support in promoting initiatives and projects that bring people of all ages together.

### **Generational solidarity: previous paths and emerging challenges**

Science, research and even large political action plans highlight the need to incorporate intergenerational solidarity in response to economic and social challenges. It still needs to be made real by implementing public social policies and practices of citizens and communities (including public, private and third sectors). In order for this movement to gain strength it is vital to recognise the path travelled so far.

Intergenerational programs emerged in the 1960s as vehicles for continued learning and exchange of resources between generations, with the purpose of achieving social and individual benefits (Newman et al., 1997; Bostrum et al., 2000). In the 1960s, these programs were focused on connecting the older persons to schoolchildren, so that children could improve their academic performance and their knowledge about aging.

The years 1970/80 witnessed the development of policies and social networks that unite young and old. In the 1990s manuals, videos and institutes promoting intergenerational relationships emerged. The 2000s allowed greater dissemination of practices, programs and policies in international terms and attempts to define best practices (Newman et al., 1997; Jarrott, 2011). These programs are based on two factors ( Jarrott, 2011): passing on traditional culture to the younger by the elderly (providing the younger with a new sense of place in time

and ensuring the continuity of culture, fostering individual and community identity); the need to unite generations (bringing different contributions together).

Intergenerational programs focus on the link between various generations to respond to social problems, i.e. each generation and each person contributing with what makes them unique: children are the guarantee of continuity and social evolution, and need education and emotional support; teenagers represent those who defy ideas which are preconceived and taken for granted, and they may contribute to important social changes; adults have a role in ensuring the economic sustainability and continuation of the family. The role of older people remains to be defined, for in a society too focused on economic gains it is either difficult to value the contribution of those non-active older people, or there is a tendency to appreciate the elderly who remain productive, such as volunteers. This contribution is very real and relevant, but it continues to focus on an economically oriented input, which hardly characterizes the unique and special contribution of an elderly person. We consider that the most special contribution of the elderly derives from their life experience, which translates into an ethical and developmental contribution: life lessons, boosting of social will, keepers of history and communal identity.

Intergenerational programs and policies require a fundamental change of perspective (Walker & Fong, 2010): from the roles divided between generations (active versus non-active) to the cooperation between generations (contribution from each according to their capacities, skills and motivation). At this point, it seems important to associate the movement of intergenerational practices to social entrepreneurship and thus raise population aging to a way in which to achieve an opportunity for social and economic development.

Social entrepreneurship combines entrepreneurship (economics and business management) and the development of the third sector or social economy. It presents a social mission, since it aims to achieve the common good (similar to the values inherent to intergenerational solidarity); and it results from a social need to which one wants to respond. Social entrepreneurship has the potential to promote human capital because it focuses on promoting social and community development through structural changes that respond to social problems. The essential of social entrepreneurship lies in social value and it can generate economic value.

Intergenerational practices associated with social entrepreneurship can connect generations and contribute to social and economic development (Vandervan, 1999; Kuehne, 2003). These programs are developed in the local community, focusing on identity, i.e. on what is unique. They focus on overcoming social problems and concentrate on values of solidarity and development. Thus, they promote social and economic development.

This proposal may seem overly theoretical, but the changes inherent to population aging require reflection and deep understanding of the opportunities and challenges we face.

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