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INTERGENERATIONAL RELATIONSHIPS: IN-DEPTH DISCUSSION

INTERGENERATIONAL RELATIONSHIPS IN AGEING SOCIETIES

Note by the secretariat

Summary

At its first meeting, the Working Group on Ageing adopted its programme of work for 2009–2010 (ECE/WG.1/2008/3), which includes promoting the use of the newest research findings on intergenerational relationships to inform ageing-related policy. To implement this, the Bureau of the Working Group decided to organize an in-depth discussion on intergenerational relationships at the Working Group's second meeting (ECE/WG.1/2009/3). The note below, prepared by an expert¹ in consultation with the secretariat, briefly explores the key policy issues in this area, with the aim to guide the discussion. The note will be accompanied by a detailed presentation and an interactive discussion with member States, which are invited to provide information from their respective countries in response to the questions contained herein. A more detailed paper, containing information discussed during the meeting, will be prepared subsequently and distributed to member States.

¹ This document is based on the contribution by Ms. Pearl Dykstra, Netherlands Interdisciplinary Demographic Institute.

I. KEY PREMISES

1. Population ageing is not only about older persons: it affects people of **all ages**. In debates on ageing societies, there seems to be an implicit assumption that demographic ageing primarily affects older persons, their economic situation, health, mobility, social integration, family support and care. Of course, increasing longevity and decreasing birth rates have resulted in larger numbers of older persons both in absolute and relative terms. Nevertheless, with dramatic shifts in the balance between old and young, the worlds of younger age groups are profoundly changed. The young are growing up in societies where they are a numerical minority and where they have several generations of family members “above” them. These considerations suggest that attention should be given to people of all ages.

2. The new demographic circumstances in which members of multiple family generations share several decades together compel us to recognize that individuals are embedded in a complex web of vertical and horizontal ties. Thus, a second key premise is that there are critical **interdependencies** between family generations and between men and women in families, which are built and reinforced by social policies. These interdependencies should not be taken for granted as it is often done. Rather, it is important to address explicitly the ways in which legal and policy arrangements constitute differential opportunities and constraints for men and women and across generations in families.

3. A third key premise is that to understand interdependencies in families, a spectrum of **levels** and units must be distinguished and recognized: country, historical generation, family, dyad (partners, parent-child) and the individual. Countries have disparate political, religious and economic histories, and different welfare state arrangements. To understand the impact of demographic changes on people’s lives, it is not sufficient to consider cross-national differences only. Regional diversity, including urban-rural differences, and social change over time must also be considered – the rapid changes in Central and Eastern Europe being a case in point.

II. THE DEMOGRAPHY OF INTERGENERATIONAL FAMILY RELATIONSHIPS

A. Multiple family generations

4. The conventional portrayal of family change under the influence of demographic trends is that the extension of life and the drop in birth rates result in “beanpole” families with relatively many vertical ties and relatively few horizontal ties. Contrary to popular belief, vertically extended families with four or five generations alive at the same time are not the norm. The majority of adults are members of three-generation families. Increased longevity and postponed childbearing have opposing effects on the generational structure of families. The extended lifespan means, on the one hand, that older family members are living longer than they did in the past, which in turn suggests that three, four or even five generations of family members may be alive at the same time. Delayed childbearing means, on the other hand, that the age gap between generations is relatively large, which in turns reduces the likelihood that multiple generations are alive at the same time. Countries where people live long lives and have children at a relatively young age, such as Denmark, France, Sweden and the United States, have the highest proportion of adults in four-generation families.

B. The sandwich generation

5. Research gives little credence to the metaphor of the “sandwich generation”, the men and women caught between simultaneous responsibilities for their parents and children. Adults typically occupy middle-generation positions between the ages of 30 and 60. This is not a period in life when both young children and elderly parents are likely to need care. For those in the younger part of the age-range (i.e. those with child-care responsibilities), parents are not at risk of frailty. For those in the older part of the age range (i.e. those caring for their parents), children will generally lead independent lives. Though researchers have repeatedly demonstrated that the metaphor of a sandwich generation juggling care commitments towards parents and children is clearly a misconception of midlife, it continues to figure prominently in public and policy debates.

6. Whereas the literature on the middle generations typically considers transfers upwards to ageing parents and downwards to children and grandchildren, it tends to disregard transfers received from older and younger generations. Yet, older generations often serve as significant sources of support and help for young families, through financial transfers, caring for young children and provision of practical help. Young adults should not be solely looked upon as dependents, but also as givers of support and care to their parents and grandparents.

C. Vertical deprivation

7. Little attention has been paid to individuals who are “vertically deprived” in the sense that they have no children or grandchildren, or no surviving parents or grandparents. Whereas an examination of childbearing and mortality patterns informs us about the existence of biological kin, an examination of divorce and separation provides insight into a different form of vertical deprivation, that is, having severed ties. Men are more likely to have broken family ties than women.

III. INTERDEPENDENCIES BETWEEN OLDER AND YOUNGER FAMILY MEMBERS

A. Opportunity structure

8. Geographic proximity facilitates face-to-face contact, which in turn increases the likelihood of exchanges of help in kind. Frequent face-to-face contact not only reduces the costs of giving, but also helps to make support providers aware of recipients’ needs. Exchanges of financial support are less affected by distance because they do not require interaction in person.

9. Intergenerational co-residence (i.e. adults living with their parents) is among the strategies that can be adopted to organize support, economic and otherwise. There are large variations across Europe in the rate of intergenerational co-residence, reflecting historical, cultural and socio-political differences. The prevalence of co-residence of older parents with their children is lowest in the Scandinavian countries and the Netherlands, highest in the Mediterranean and South-East European countries, while intermediate levels are reported for Central Europe. Co-residence patterns provide little insight into the question of who is

supporting whom. Most adults in co-residential arrangements have always lived with their parents.

B. Normative obligations

10. Family obligations are generalized expectations about family members' responsibilities for each other. They are socially shared and have a normative component. Not only do they reflect the cultural climate in which people live, but also the individual circumstances in which they find themselves. Family obligations are of interest because they are predictive of support behavior: they predispose people to behave in a certain way. Moreover, they serve as a source of information for policymakers.

11. Is there correspondence between public opinion and policies? Support for norms of family obligation tends to be lower in generous welfare states. Intergenerational interdependencies are also formalized in family responsibility laws. Maintenance obligations both upwards and downwards are quite widespread in Europe and, depending on the country, involve differentiated sets of relatives and generational levels.

C. Actual exchanges

12. Patterns of exchange in families tend to be described in terms of a north-south gradient. Intergenerational transfers of time and money among non co-resident family members tend to be less frequent in the Nordic than in the Southern European countries, with the Continental European countries being somewhere in the middle. Earlier work has rarely included East European countries, where co-residence of generations is widespread.

13. The direction of intergenerational support flows is primarily downward. Parents become net beneficiaries of help only at an advanced age. The "substitution" hypothesis – the view that public transfers crowd out private transfers – has received little empirical support in studies of Western welfare systems. More support has been found for the "complementarity" hypothesis, indicating that generous welfare states enable families to redistribute their resources.

IV. GENDERED INTERGENERATIONAL REGIMES

A. Four patterns in legal and policy arrangements

14. To understand to what degree country-specific institutional frameworks support the desire to be responsible towards one's children and frail old parents and/or support individual autonomy, thereby partially lightening intergenerational dependencies and the gender division of labour, four patterns in legal and policy frameworks have recently been distinguished:

(a) **Familialism by default:** no publicly provided alternatives to family care and financial support;

(b) **Supported familialism:** policies, usually through financial transfers, support families in keeping up their financial and caring responsibilities;

- (c) **Optional familialism:** some kind of option is given between being paid to provide care to a family member and using publicly supported care;
- (d) **Defamilialization:** needs are partly answered through public provision (services, basic income).

15. This categorization goes beyond the public/private responsibilities dichotomy, showing that public support may both be an incentive for and lighten private, family responsibilities. Generous parental leaves support parental care and, in the case of the presence of a father's quota, support the caring role of fathers, thus de-gendering family care while supporting the "familialization" of fathers. Childcare services instead lighten – without fully substituting – parental care and education responsibilities. At-home care, day care or institutional services for the frail old partly substitute family care. The same occurs when payments for care can only be used to hire someone in a formal way. Non-earmarked payments for care support informal family care but also encourage recourse to the often-irregular market, as is happening in some Southern European countries.

B. Legal and policy arrangements are not neutral

16. The packaging of gendered intergenerational obligations varies greatly across countries, as it has varied across time, shaping different contexts in which intergenerational family relationships are played out. Legal norms and social policies are not neutral. They impose dependencies that limit the autonomy of men and women, or on the contrary, support the choice to assume intergenerational obligations. For instance, long parental leaves might strengthen the gendered nature of family care, given the prevalent gender division of care tasks and the differential wages of men and women. They might also further polarize women of different social classes and income resources because women who opt for extensive leaves tend to have poorer prospects on the labour market. However, generously paid leaves, with a reserved father's quota, support the desire to provide care to family members and at the same time can help de-gender it.

17. As another example, childcare services are not only a conciliation measure helping parents (mothers) to remain in the labour market. Good quality services are also a resource for children themselves, helping them to widen their relationship with other children and other adults in an aging society, and to overcome the impact of social inequalities on cognitive development. The issue therefore is not long leaves versus services, but rather the balance between the two, together with flexibility in the use of leaves.

18. With regard to elder care, over-reliance on the family via either supported familialism or familialism by default crystallizes the gender division of labour also in the third age. It may prove inefficient in the middle and long term, since population aging – combined with women's labour market participation, marriage instability, low fertility and childlessness – is creating a caring deficit within families. Furthermore, exclusive or primary reliance on family care is in contrast with the goals of higher women's labour force participation and longer working lives for both men and women.

V. QUESTIONS FOR DISCUSSION

19. The following questions are offered to initiate discussion by the Working Group:
- (a) How can national policies support intergenerational care regimes without reinforcing social class inequalities and gender inequalities?
 - (b) What kinds of interdependencies between generations and between men and women in families are built and reinforced by the legal and policy arrangements in your country?
 - (c) How can national policies get men more involved with caring?
 - (d) In supporting families with care needs, should government provide care services, income transfers or a mix of the two?

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