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Intergenerational Solidarity: Policy Challenges and Societal Responses

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Policy Briefs are a publication series providing a synthesis of topics of research and policy advice on which European Centre researchers have been working recently.

The Spanish EU Presidency event “Conference on Active and Healthy Ageing”, held at Logroño (La Rioja), 29-30 April 2010 celebrated the European Day of Solidarity between Generations on 29 April. Convened under the aegis of the European Community Programme for Employment and Social Solidarity – PROGRESS (2007-2013), the authors presented to the first day Plenary Session on “Policies and Actions in Europe for an Active and Healthy Ageing”. Their presentation, “Intergenerational Solidarity: Policy Challenges and Societal Responses”, complemented the earlier plenary sessions which had discussed policy practices at local, national and European level in relation to the enhancement of solidarity between generations.

I. Introduction

The challenges associated with population ageing in EU countries are traditionally sketched out in two contrasting ways. *First*, there is a concern about the financial sustainability of public welfare systems, which are affected adversely by a rising share of older age population. Such concerns have become more evident and evidenced in the wake of the worst economic downturn Europe has faced since the 1930s. *Second*, important as fiscal prudence in public spending has become, it is also considered imperative that European social welfare systems continue to provide adequate retirement incomes and sufficient basic social services, such as health and social care, in old age.

The notion of social sustainability in societies experiencing population ageing encompasses the ideas of pension adequacy and financial sustainability, and also aspects of solidarity between generations.

Each of these concerns justifiably merit the policy scrutiny and priority which are happening –albeit at varying degrees and pace – across EU countries and contributing to lessening the future economic challenges. A less discussed and also less clearly defined goal is that of *social sustainability*, which encompasses both the ideas of pension adequacy and financial sustainability, but also includes an inter-generational solidarity aspect. The notion of social sustainability requires that a balance is achieved between the distribution of resources across different generations at a single point

in time (such as between young and old), and ensuring that future generations of old and young have the same or greater access to social resources as their counterparts in the current generation.

What has become obvious is that in the new demographic mix people need to embrace the need for mutually beneficial and satisfying relationships between generations.

Social sustainability also captures a wider conception that goes beyond incomes and provision of public services. Taking the perspective of the older age generation, the social sustainability needs include not only adequate pension income but also access to affordable and good quality health and social services. What has become obvious is that the societies experiencing population ageing have a new demographic mix in their population and they need to embrace the need for mutually beneficial and satisfying relationships between generations. Creating an awareness of importance of intergenerational relationship, and recognising not only their diversity but also their complementarity, will allow public policy strategies to address the resulting needs satisfactorily. Without such awareness and intergenerational policies, we believe that a strong risk of perverse ‘competition’ for limited resources across young and old will develop – to the detriment of both generations, and society in general. There is ample scope for developing effective solutions which are cooperative and mutually beneficial to current and future generations.

This Policy Brief addresses the policy challenges that intergenerational solidarity presents, and how societies are responding to them. The discussion is structured as follows.

- **Section 2** covers how international policy agendas highlight the importance of intergenerational solidarity in the context of ageing societies, and what is meant by the term intergenerational solidarity within international policy frameworks. Indeed, there is no shortage of mention of intergenerational solidarity – from Copenhagen (1995) for the International Year of Older People (IYOP), through to Madrid (2002) for Madrid International Plan of Action on Ageing (MIPAA), to Berlin (2002) for Regional Implementation Strategy (RIS), and in León (2007) for a review of the MIPAA/RIS, and also in multiple communications from the European Commission as well as Lisbon Treaty (2009).
- **Section 3** shows the first results from attempts to measuring societal response, and provides the current status of intergenerational solidarity across 27 EU countries. They have been produced by using results from a Flash Eurobarometer, titled “Intergenerational Solidarity”, conducted during March 2009, providing perceptions on this matter of about 27,000 Europeans across all EU Member States.¹ The key results from this survey highlight a common cross-generational

difference: people of different generations do not easily agree on what is best for the society. A common fallacy – that worksharing between younger and older workers will allow younger persons to be employed more often if older workers retired early – is widespread among the Europeans, although there are important differences across countries in this respect. Similarly, a strong negative verdict is given by Europeans on the performance of their governments in promoting a better understanding between the young and the old. Only 27% of EU citizens overall believe that their national government is doing a good job in promoting a better relationship between the young and old. The citizens of Eastern European have been particularly strong in criticising the performance of their government in this respect.

- **Section 4** concludes, reflects and makes recommendations. Societies must continue promoting positive yet realistic image of the ageing phenomenon and older persons, with a plea to all stakeholders (civil society, media, academia, governments and EC) for their cooperation in this endeavour. Moreover, roles of local authorities, public volunteering centres and schools to be enhanced in promoting interactions (and solidarity) across young and old generations. Governments need to do more and also convince public about their pro-activity in dealing with challenges arising concerning intergenerational relations. The European Commission should confirm 2012 as the European Year of Active Ageing and Intergenerational Solidarity. A proposal had also been made that a research observatory should be established to function during 2012, with an aim to generate a substantive report on the challenges and opportunities for Europe of all generations.

2. Policy challenges identified in international policy frameworks

United Nations 1995

One of the first related references is the conceptual framework for the preparation and observance of the International Year of Older Persons (IYOP) in 1999. It included as one of four key facets the term “Multi-generational Relationships”. The theme of the IYOP was also very much related ‘Towards a Society for All Ages’, and such a society was defined as one that:

“adjusts its structures and functioning, as well as its policies and plans, to the needs and capabilities of all [generations], thereby releasing the potential of all, for the benefit of all”.

It goes on to state that:

“A society for all ages would additionally enable the generations to invest in one another and share in the fruits of that investment, guided by the twin principles of reciprocity and equity” (United Nations 1995).

These two statements, particularly the latter, provide us a good idea of what is meant by intergenerational collaboration and solidarity and how societies adapting to demographic changes will have to work towards promoting a linkage between generations.

United Nations in Madrid 2002

Madrid hosted the 2nd World Assembly on Ageing, in 2002. The political declaration signed at the conclusion of the Assembly is known as “the Madrid International Plan of Action on Ageing” (MIPAA), and it has a clear reference of solidarity between generations in Article 16:

“We recognize the need to strengthen solidarity among generations and intergenerational partnerships, keeping in mind the particular needs of both older and younger ones, and to encourage mutually responsive relationships between generations” (MIPAA, article 16, p. 4)

Among others, also [Issue 5](#) has the specific objective of “Strengthening of solidarity through equity and reciprocity between generations”. One of the actions required under [Issue 5](#) was to

“Consider reviewing existing policies to ensure that they foster solidarity between generations and thus promoting social cohesion” (MIPAA, p. 17).

UNECE: RIS 2002 in Berlin

An important benchmark for Europe during 2002 was the signing of the ‘Regional Implementation Strategy for the MIPAA for UNECE region’ (Berlin, 2002). All ten commitments and associated objectives include references to fostering solidarity between generations for the mutual benefit of all.

For example, under Commitment 2, a specific objective states: “Promote the integration of older persons by encouraging their active involvement in the community and by fostering intergenerational relations” (UNECE 2002, p. 4). Commitment 9 identifies the vital role of the family: “To support families that provide care for older persons and promote intergenerational and intra-generational solidarity among their members” (UNECE 2002, p. 19).

UNECE: Ministerial Conference on Ageing 2007 in León

The year 2007 marked the 5th anniversary of the signing of the MIPAA and the RIS. The UNECE's Ministerial Conference on Ageing, in León, Spain, reaffirmed the commitments made in the Berlin Ministerial Declaration in 2002 to implement the RIS of the MIPAA. Also, it adopted the Ministerial declaration "A Society for All Ages: Challenges and Opportunities", with the following policy commitments by UNECE member countries:

"We are committed to promoting intergenerational solidarity as one of the important pillars of social cohesion and of civil society". "We encourage initiatives that raise public awareness of the potential of young people and of older persons and that promote the understanding of ageing and intergenerational solidarity." (UNECE 2007, p. 4)

In brief, the UN activities over the last 30 years show the emergence and growing awareness of the importance of intergenerational solidarity and social cohesion. Through their involvement in ageing related policies they provide a good grasp of what is meant by intergenerational solidarity and what is believed to be the outcome: a society for all ages.

European Commission

The European Union response to recognise and advocate the importance of intergenerational solidarity has come later than that for the UN but it has provided sufficient impetus. One prominent reference from the European Commission is the Green Paper "Confronting Demographic Change: A New Solidarity Between the Generations", dated 16th March 2005. Other communications, particularly those referring to the demographic transition and its impact, highlighted in clearest terms the importance of intergenerational solidarity and social cohesion.

Under the Slovenian EU Presidency, the European Union has given a new impetus to the need of intergenerational solidarity for cohesive and sustainable, both economically and socially, European societies.

The EU-Presidency event in Brdo (Slovenia), 28-29 April 2008, resourced by the European Commission, titled "Intergenerational Solidarity for Cohesive and Sustainable Societies", is another example of European Commission's involvement in promoting intergenerational solidarity as central to the European social model. The event had as objective "to initiate a new approach to policy development that ensures solidarity between generations", and to "present, through examples of good practice, positive cases of intergenerational solidarity and cooperation". During the event, 29 April was designated as the European Day on Intergenerational Solidarity and Cooperation, and this is an important step for Europe so as to rekindle every year the importance of intergenerational solidarity for a fair and sustainable society.

A reference in the Lisbon Treaty (2010) is important for making the promoting of solidarity an explicit aim. Article 3.3 mentions solidarity between generations as one of the key aims of the European Union towards promoting the well-being of European citizens:

“It (the Union) shall combat social exclusion and discrimination, and shall promote social justice and protection, equality between women and men, solidarity between generations and protection of the rights of the child”

Partly by reason of this, European Commission is set to announce the ‘2012 European Year of Active Ageing and Intergenerational Solidarity’ – in its communication towards adapting to the needs of an ageing society. The campaigning efforts of AGE – The European’s Older People Platform – and other national and European NGOs seek to bring intergenerational solidarity to the forefront of debate and policy concern, and to highlight the social sustainability challenges that ageing societies will face. The Flash Eurobarometer survey is the key indicator of the European Commission’s commitment, which is conducted by the Gallup Organisation, Hungary, upon the request of Directorate General Employment, Social Affairs and Equal Opportunities. It marked the 1st European Day on Solidarity and Cooperation, on April 29, 2009. This is what we turn to review the current status of different aspects of intergenerational solidarity across 27 EU member States.

3. The current status of solidarity across generations in EU

The results and analysis reported here are derived from the Flash Eurobarometer 269: ‘Intergenerational Solidarity’, survey date March 2009, publication 2009. We present here only the key results, covering three aspects: (a) perceptions on the relations between younger and older EU citizens, (b) perceptions on affordability of pensions and elderly care, and (c) perceptions about the role of public authorities towards intergenerational policies.

a) Relations between younger and older people

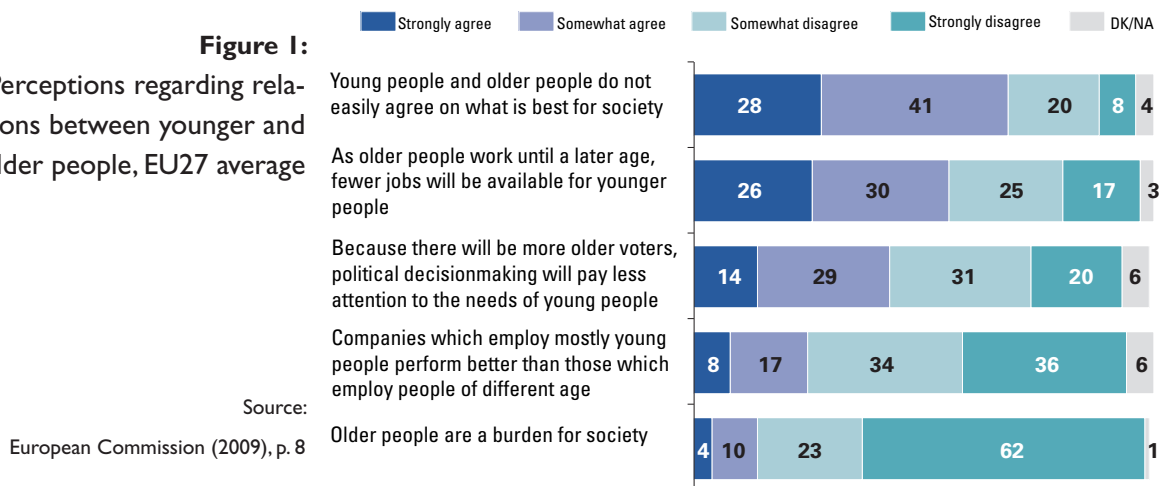
Over two-third of European citizens hold the opinion that young and older people do not easily agree on what is best for society.

When people living across 27 EU countries were asked about the current state of relations between the younger and older generations, they were most likely to say that young people and older people do not easily agree on what is best for society. This result is depicted in the top horizontal bar of Figure 1: 28% strongly agreed, and another 41% somewhat agreed, to the statement that there is a conflict across generations in agreeing what is best for the society in which they live.

Along the same lines, a slim majority of EU citizens (56%) agreed that as older people work until a later age, fewer jobs will be available for younger people. This result also points to areas of a potential conflict between generations, and a future risk of mounting tensions that will coincide with a rising proportion of older people. For this specific aspect, the country variation is also analysed below.

In contrast to the above results, Europeans are least likely to agree that older people are a burden on the society (4% strongly agreed and 10% somewhat agreed); more than 60% strongly disagreed that older people are a burden. In the same vein, roughly half of EU citizens disagreed with the proposition that the existence of increasing numbers of older voters meant that decision-makers would pay less attention to young people's needs.

Figure 1:
Perceptions regarding relations between younger and older people, EU27 average



Source:

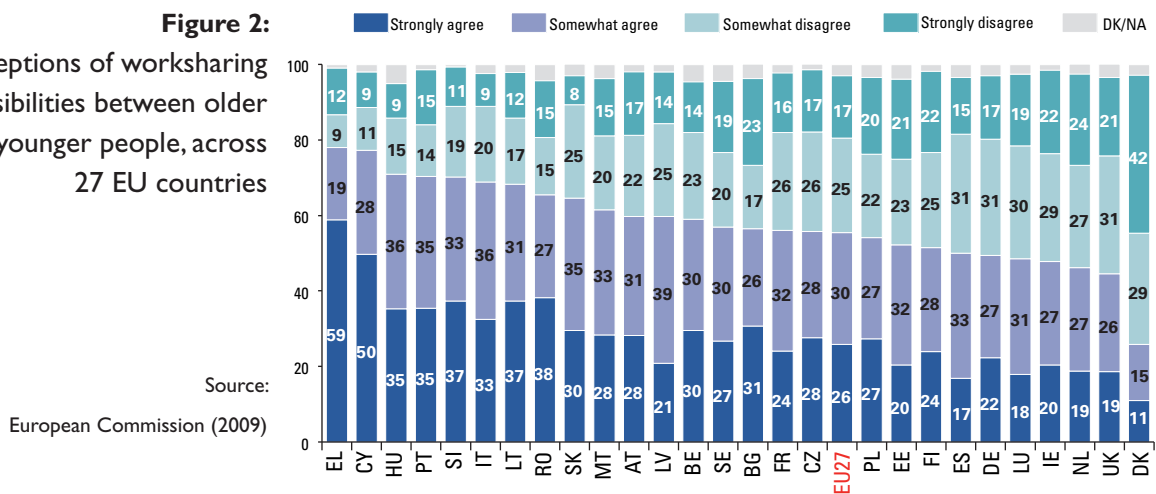
European Commission (2009), p. 8

In the current environment of slow and uncertain recovery from the economic downturn, the opinion is strong that older people working later into life would result in fewer jobs for younger people. This common fallacy of worksharing affects public opinion and policymakers decision, which has a damaging effect on the case for raising the retirement age.

In the current environment of high unemployment, the perception older people working later into life would result in fewer jobs for younger people, is quite disconcerting, all the more so for being wrongly based and specious. This perception amongst EU citizens is worrying as it points to a common fallacy, known as the worksharing (or, sometimes, 'lump of labour') fallacy, and this needs correcting. This is particularly so as youth unemployment has soared during the recession of 2008/09, and with the current recovery being slow and uncertain, these arguments are being given a fresh backing. Though they are no less wrong for being repeated, this repetition gives them a more widespread currency which affects public opinion and policy-maker decision. One of the damaging effects of such fallacious reasoning is that the case for policies which promote a raising in the retirement age is weakened when, if anything, they should be strengthened.

There are wide variations across countries in this respect, as shown in Figure 2. Greeks, Cypriots, Portuguese, Hungarians, Slovenes, Italians and Lithuanians were most worried with the outlook that if older people work until a later age there will be fewer jobs for younger people: in excess of two-thirds somewhat or strongly agreed with this proposition. Denmark offers the other extreme, where 71% of respondents strongly disagreed. The majority of British, Dutch and Irish are also likely to disagree with the prospect of the worksharing idea between younger and older generations.

Figure 2:
Perceptions of worksharing possibilities between older and younger people, across 27 EU countries

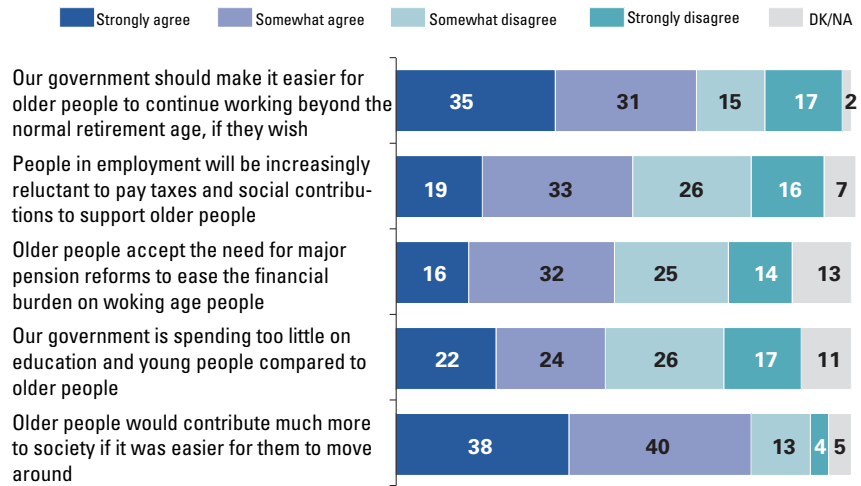


b) Affordability of pensions and elderly care

While the previous perceptions paint a negative picture, things improve a bit in this section. By contrast, as many as two-thirds of respondents in EU 27 countries agreed that their government should make it easier for older people to continue working beyond the normal retirement age – if they so wish (see Figure 3). This opinion offers a good prospect of acceptance of longer working careers in the future. Given the perceptions about worksharing (as discussed above), this result shows that people are not linking extension of working careers with youth unemployment (unless prompted), and this is despite high youth unemployment during the current economic downturn.

There are more evenly divided opinions when people were asked whether their national government’s expenditure on young people and on education is too little, in comparison with the amount spent on older people: 46% somewhat or strongly agreed and 43% in total disagreed with this proposition. Thus, on average, there are no serious concerns emerging at this stage about budgetary allocations, and this is an area where there are important country variations and it should be kept on watch in the future.

Figure 3:
Perceptions regarding the affordability of pensions and elderly care, EU27 average

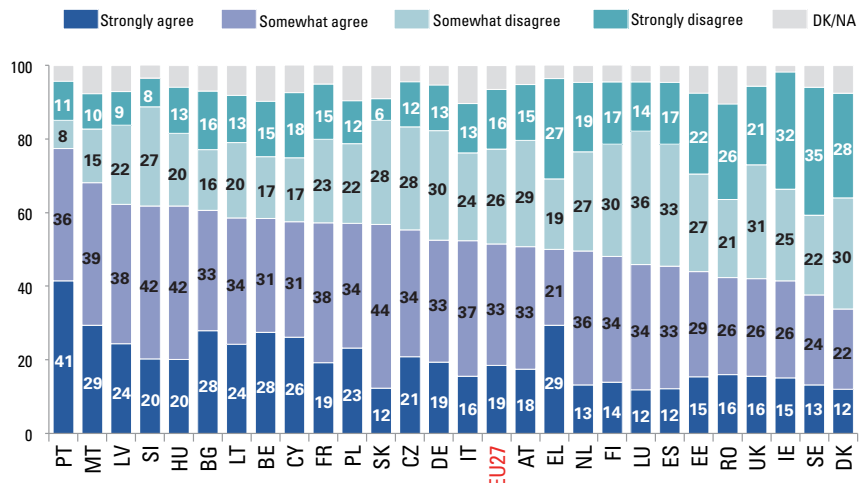


Source: European Commission (2009), p. 14

More relevantly, and alarming, are the results that a little over half of Europeans agreed that employed people will be increasingly reluctant to pay taxes and social contributions to support older people. Using Figure 4, the country variation with respect to this important aspect of economic solidarity across generations is analysed further.

Figure 4 shows that Portuguese respondents most frequently agreed that people in employment will be increasingly reluctant to pay taxes and social contributions to support older people (in total, 77% agreed). Portugal stands out as the country where respondents strongly agreed with this proposition; other countries with high proportions of those strongly agreeing are Malta, Greece, Bulgaria, Belgium and Cyprus. In contrast, in Denmark, Sweden and Ireland, almost 60% of respondents disagreed (somewhat or strongly) that people in employment will be increasingly reluctant to pay taxes and social contributions to support older people.

Figure 4:
Employed more reluctant to pay taxes and social contributions to support older people, across 27 EU countries



Source: European Commission (2009)

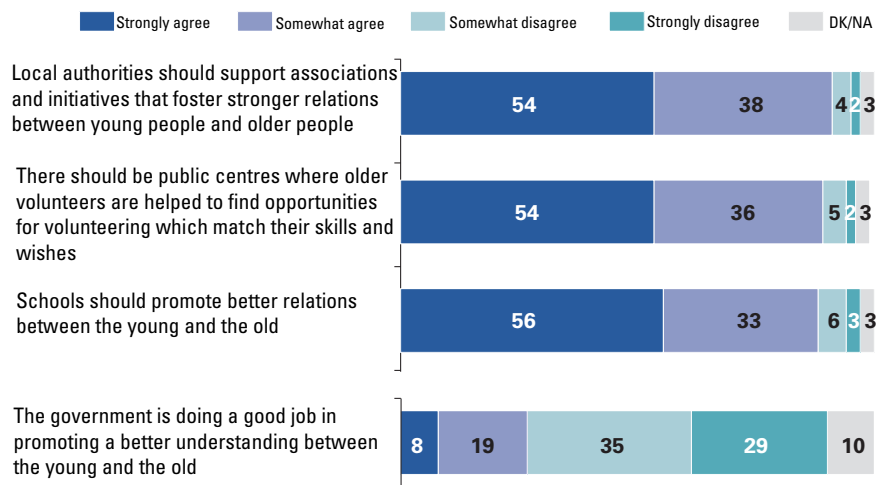
c) Role of public authorities

A strong negative verdict is given by Europeans on the performance of their governments in promoting a better understanding between the young and the old. Only 27% of EU citizens overall believe that their national government is doing a good job in promoting a better relationship between the young and old. The citizens of Eastern European have been particularly strong in criticising the performance of their government in this respect.

Results included in Figure 5 show that, in people’s opinion, the role of public authorities in promoting relations between young and old is important. Close to 90% agreed that local authorities should support associations and initiatives that foster stronger relations between young and older people, schools should promote better relations between the young and the old, and there should be public centres where older people are helped to find opportunities to volunteer for tasks that match their skills and wishes.

More striking is the result that just over 60% of Europeans disagreed (strongly or somewhat) that their government does a good job in promoting better understanding between young and old. A strikingly high proportion (one-tenth) of respondents mentioned that they “did not know” whether their government was doing a good job or not. This country variation with respect to the perceptions about the role of government is further analysed below.

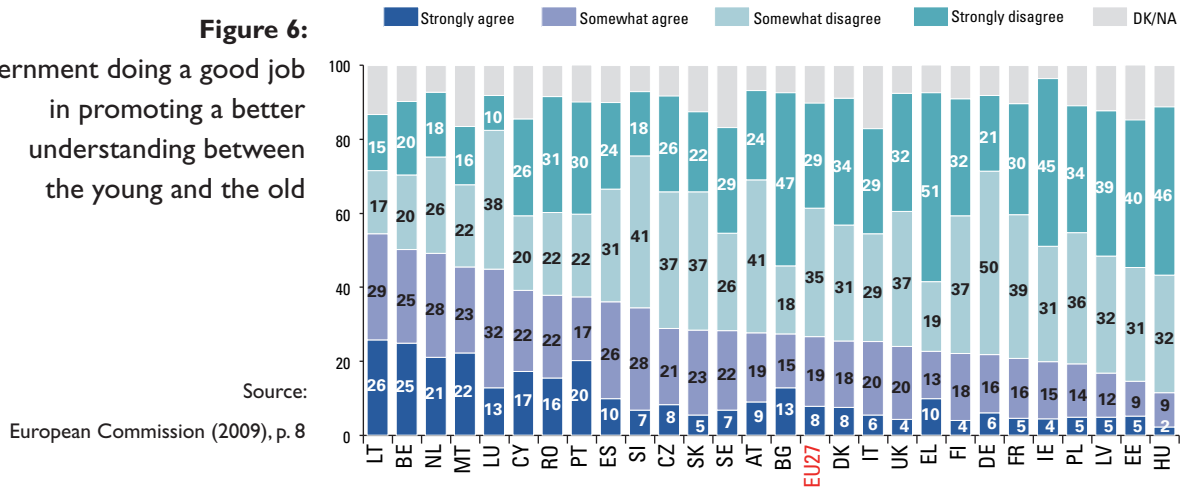
Figure 5:
The role of public authorities in promoting intergenerational solidarity



Source: European Commission (2009), p. 8

Only in Lithuania and Belgium, respondents believed that their government does a good job in promoting a better understanding between young and old (55% and 50%, respectively, agreed with the statement). Respondents in the majority of other EU countries (more than 60%) disagreed that their government does a good job in this respect. The highest disagreement is observed in Hungary (78%), Ireland (76%) and Latvia (71%). Greece and Bulgaria stand out as its respondents were highly likely to “strongly” disagree their government is doing a good job in promoting a better understanding between (51% and 47%, respectively).

Figure 6:
Government doing a good job
in promoting a better
understanding between
the young and the old



Source:
European Commission (2009), p. 8

4. Conclusions and recommendations

The international policy frameworks of the UN and also that of the European Union highlight the importance of the intergenerational solidarity in setting the future policy agenda. The Flash Eurobarometer of the European Commission provides the empirical evidence about the current reality of solidarity across generations among the EU citizens. A finding of concern is that there is a common perception that people of different generations do not easily agree about what is best for the society. Similarly, there is a common fallacy about the worksharing possibilities between younger and older workers, which has strong implications in the current economic climate. EU citizens give a strong negative opinion on the performance of the government in promoting a better understanding between the young and the old.

It becomes imperative that societies should continue to promote positive yet realistic image of ageing and older persons. A plea is extended to all major stakeholders (civil society, media, academia, governments and the Commission) in their cooperation with each other in raising awareness towards the need of intergenerational solidarity. Roles of local authorities, public volunteering centres and schools to be enhanced in promoting interaction across young and old generations, and governments need to do more and convince public about their pro-activity in dealing with challenges arising. Also, a strong appeal is made to the European Commission to confirm 2012 as the European Year of Active Ageing and Intergenerational Solidarity. In the process, it should also set up a research observatory, with an aim to generate a report on the challenges and opportunities for Europe of all generations.

Note

I The Flash Eurobarometer survey is conducted by the Gallup Organisation, Hungary, upon the request of DG Employment, Social Affairs and Equal Opportunities. It marked the 1st European Day on Solidarity and Cooperation, on 29 April 2009.

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Full reference of the EU Presidency event

Conference on “Active and healthy ageing”, Logrono (La Rioja), Spain, 29-30 April 2010 (http://www.imserso.es/imserso_06/el_imserso/relaciones_internacionales/rel_intern_europa/conferencia_ajejamiento_activo_saludable/index.htm#ancla1)



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