

## Chapter One

### Intergenerational Solidarity

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#### Introduction

Intergenerational solidarity (IG) is an intentional connection between two or more persons of different age groups. As will be explained and illustrated in this volume, their bonding reflects personal wishes and material goals, emotional bonds and rational justifications, altruism or self-interest, care giving and care receiving. The study of IG solidarity requires a genuine interdisciplinary approach that can enable the intersection of professional expertise in related disciplines including anthropology, demographics, economics, geriatrics, social psychology, and sociology. This chapter provides an entry point to this study. The goals of the chapter are the following: First, to investigate the meaning of intergenerational solidarity, its dimensions and evolution; second, to review the evolution of theoretical perspectives and the establishment of an independent field of IG studies; third, to present a simple model that can be used to assess the complex connections between cultural values, institutions, demographic and socio-economic dimensions, and how societies use private and public arrangements to provide care to children and older persons; and finally, to highlight current trends that affect and/or can be affected by IG solidarity.

#### 1. Intergenerational (IG) Solidarity

Many analysts define IG solidarity as bonding between and among kin and individuals in multigenerational family networks and among different age cohorts in the larger community (see Bengtson and Oyama in this volume). The relationship between IG solidarity and social cohesiveness is one of a circular causality as more solidarity results in more cohesiveness and vice versa when conflict and tensions can be minimized. Representing a de facto social contract or compact, IG solidarity:

- Enables socio-economic development, sustainability, endurance, ability to build bridges and overcome adversity within families and communities who share common identities and interests: “Humankind is interconnected and interdependent now and throughout time. IG practices were created in recognition of this compact, the importance of maintaining it, and to honour the strengths and abilities of each generation” (see Butts in this volume).
- Bonds people together through values, associations and interactions, consensus and exchange, agreements, feelings of affective orientation and similarities.

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- Ensures the transfer of knowledge and culture forward through meaningful exchanges among persons of all age groups: children, youth, young adults, and those at middle and older ages.

All societies exhibit IG solidarity, a core element of IG relationships, which bonds generations that share common interests, feelings of affection and affinity, reciprocity, mutual care and protection. IG solidarity is reflected in the love and caring that parents and children have for one another despite geographical distance and differences in life experiences. It ties individuals together and, most importantly it enables mutual support, care, and exchanges of services.

In the family, adult children care for their aging parents, and similarly, they are also concerned about the well-being of older relatives and friends, assisting them with chores and visiting them periodically. Parents support their children when they are young and into adulthood. There are many instances when grandparents provide care to grandchildren because parents are absent due to work or for a variety of reasons such as migration, divorce, death and incarceration. As a result of population aging, an increasing number of older adults and grandparents are available in families to provide support to younger relatives, performing housekeeping chores, assisting in raising children and ensuring that traditions and values are passed from one generation to the next. More importantly, they have become an adaptive resource ensuring the integrity of nuclear families (Silverstein, Giarusso and Bengtson, 2003).

IG relationships exist within a broad universe of social systems and networks, from individual families to larger communities and nations. Similarly, solidarity among generations connects individuals within kin and a familiar nucleus and within and among communities and nations. It is only natural that feelings of mutual sympathy and respect promote positive relationships and interactions. Solidarity among generations is an outcome of social processes that are affected by age, gender, culture and ethnic background, socio-economic status, religion, values and other factors, along with world views that are constantly evolving. Generations themselves are diverse and multicultural and affected by context in which they are evolving, sometimes in unexpected ways. Socio-economic background and differences in culture, ethnicity or religion are important attributes that can create differences in generational culture and social behavior. Major social disruptions such as natural disaster or civil war may have life-long effects on the future of one or more generations by forcing displacement, reducing years of schooling, destroying endowments, and promoting strategies to overcome adversity.

In view of wide differences in networks and context, the social cohesion implied by IG solidarity may be an elusive goal. Dissociations between generations may be caused by lack of coincidence of interests, lack of affection, conflicts around issues of distribution and equity, geographic separation, catastrophic events, and demographic changes that negatively impact the sustainability of formal and informal social protection systems (United Nations, 2001, part four). Given that relationships change and evolve, interactions between generations may often include negative feelings, apprehensions, tensions, and even open conflicts that are natural within families and larger communities.

Negative interactions may be inevitable and may develop into difficult situations that affect the existing trust and affection between generations. While they may present opportunities for dialogue and the amicable resolution of conflict, they may also cause open confrontation, ruptures and the ensuing erosion of social cohesion of families and communities.

The bonding among individuals, however, is a force that can create unity even in a context of difference and tension. Bonding can be strong or weak depending on ability and opportunity of stakeholders to use IG solidarity as a societal resource. There is a feeling of optimism in the opportunities that lie ahead for greater integration of all ages in all spheres of life, at work and at home, within the family and in communities, and through public policies that enable to better balance work and family life. If governments and stakeholders are able to promote greater flexibility in the job market and greater support for vulnerable persons then, as Bengtson and Putney (2006) indicate, “In such a context, we predict that complaints of generational inequity and threats of generational conflict will have little resonance in twenty-first century society.” (Bengtson and Putney, 2006, p.29).

### **The positive, normative and collective action dimensions of IG Solidarity**

In the last two decades IG solidarity has received enormous attention among scholars and development practitioners who have contributed meaningfully to the literature on several topics -- such as the study of living arrangements for older persons around the world (United Nations, 2005a), issues of IG equity, age and gender discrimination, neglect and abuse of vulnerable segments of the population (including children, teenagers and older persons), the evolution of the family as well as security and health of family members. The analysis of all observable and measureable aspects of IG relationships, that I will call the positive or factual dimension, helps us better understand how people bond. The values and ideologies that inspire people to bond hold societies together. An inquiry into these core principles, that I call the normative dimension, provides us with clues on why people bond the way they do. And finally, programs that are intentionally designed to promote IG exchanges and solidarity or ways to improve how different generations support each other will be called the collective action dimension. An analysis of these programs helps us better understand how societies can gain or enhance cohesion through the fostering of IG relationships.

### **The normative dimension**

IG solidarity is in itself a noble aspiration. The belief that IG solidarity helps make “better societies” is a core value that is associated with responsible active citizenship and fraternity (Schindlmayr, 2006).<sup>2</sup> Moral duty and social ethics (normative dimension)

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<sup>2</sup> Schindlmayr, Thomas, 2006. “Reconsidering intergenerational concerns.” In: *International Journal of Social Welfare*, vol 15, pp. 181-184, indicates that “There is a degree of moral obligation across generations in every society,” p. 181. He also states that younger and older generations are bound by an implicit social contract that supposes that each generation should take care of others at different stages of

influence people for example, to give care and help smooth the consumption of their families and be attentive to community needs (Aboderin, 2006).<sup>3</sup> Beyond the realm of family, the belief in the power of solidarity encourages individuals to collaborate in the creation of cooperatives, associations and other forms of joint efforts to pursue goals that strengthen society, the economy and that improve the allocation of resources. Thus, normative justifications relate motivations for actions to the effectiveness and performance of said actions.

In the liberal tradition, solidarity has been part of the set of principles, such as freedom, equality and fraternity that form the foundation of democratic societies. For example, social security systems based on the Bismarckian model of tripartite contributions from government, employers and workers reflect recurring IG solidarity from active workers to beneficiaries. Contributions help fund benefits for pensioners, the sick and disabled, widows, orphans, the unemployed, and the poor -through social assistance programs. This model has been prominently instituted and continues to be one of the social protection pillars in most developed countries. In developing countries there is ample evidence that caring for older persons is regarded as a moral responsibility even when younger adults may not have the financial means to provide the needed care. They would still help in accessing hospitalization care or seek ways to support older ailing persons (see Moneer in this volume).

Societies with a strong sense of morality and religious beliefs seem to foster the value of elderly care across age, gender, and socio-economic background. Religion as a motivational factor in sustaining the notions of filial duty is an important community value that often nurtures IG relationships. Faith leaders who are in close contact with their communities can play a leading role in strengthening the bonds between older and younger persons. In such ways, values, beliefs and traditions help shape IG solidarity.

Timely conceived and successfully implemented policies and programs that promote IG relationships also impact IG solidarity outcomes. They can improve attitudes, sentiments, and behavior, and move society closer to the goal of being a better integrated society. The latter is characterized by responsible acts and socially aware people who appreciate constructive and sensitive actions from others toward themselves, from them toward others, and others toward others (Kolm, 2000, p. 2). In fact, policies that enable the realization of human rights and the individual freedoms of all people complement educational programs that underscore social justice.

In societies with strong social democratic traditions, social policy aimed at universal coverage of basic needs is an important goal. Here, public transfers of funding for special subsidies that target the vulnerable (jobless single mothers, old people without support, the sick and disabled, orphans and ethnic minorities) result in a higher level of integration than in countries that lack these provisions. To advance the well-being of specific socio-

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the life cycle. In societies where governments are not main providers of institutionalized forms of the contract, families and communities main the contract.

<sup>3</sup> Within the family, Aboderin 2006 distinguishes the material (*factual or positive*) from the normative justification for IG support in her analytical framework.

demographic groups, the United Nations has adopted global normative initiatives such as the *World Programme Action for Youth* (United Nations, 1995; 2005b) and the *Madrid International Plan of Action on Aging* (United Nations, 2002) that seek the mainstreaming of youth and aging concerns in the design and implementation of national development strategies and social policies.

### **The positive dimension**

Research on IG relationships can answer questions such as how much IG solidarity exists in families and communities, how bonding evolves, and impact on society, Analysts and policy makers gather data across ages, filial or non-filial relationships, gender, socio-economic class, types of communities and so on to assess the degree of social cohesion, reciprocity, harmony, tension, stress or happiness in any given social group. Using a variety of methodologies (such as focus groups, interviews, surveys, questionnaires), researchers can measure and appraise IG solidarity; they can map the impact of transformations in the family structure, as well as appraise socio-economic and demographic changes and the effect of public policy interventions. This information is crucial to understand how much solidarity exists and whether interventions are effective.

### **The role of collective action**

People use IG solidarity to mobilize, advocate and promote change through collective action on issues that are of interest to members of one or more generations. Through the use of voting rights to support a particular political action, citizens can defend their personal interests and seek to join people having similar interests, define agendas, and push for public policy changes to attain common goals. The strongest movement in support of aging and intergenerational solidarity is represented by AGE Platform Europe which constitutes a network of more than 150 organizations. AGE represents the interests of 150 million aged 50+ in the European Union. In 2009, AGE helped form the European Intergroup on Ageing and Intergenerational Solidarity that represents approximately forty members of the European Parliament. This organization is pushing for legislative changes that can ensure greater IG solidarity and collaboration among generations in the EU's social agenda. In the European context, the commitments to end elder abuse (in its multiple expressions; see Lowenstein in this volume) and develop high quality long term care services for older persons are high priorities. AGE has also proposed that 2012 be the European Intergenerational Solidarity Year to promote greater awareness on its importance.

In addition to ensuring income security for old age and ending elder abuse, another issue that concentrates IG dialogue is climate change. It has emerged as a uniting core of interest for young and old activists, scientists, stake holders and policy makers around the globe. According to current research, it is expected that the negative effects of climate change will be greatest in developing countries in terms of loss of life and negative economic impact. Least developed countries have less adaptive capacity to prepare for the risk of damage from both present climate variability and future climate change (including temperature increases, increases in floods and droughts, irreversible damage to

natural systems and vulnerability of human systems – health, human settlements, energy, industry, insurance and other financial systems) (McCarthy and others, 2001). In these countries, pressures from other development challenges, such as resource depletion, unequal access to resources, economic impact of globalization, conflict, poverty and incidence of diseases such as HIV/AIDS, augment climate change vulnerability (Intergovernmental Panel on Climate Change, 2007).

In addition to including climatic risks into the design of development strategies, countries will need to increase the effectiveness of resource management and poverty reduction efforts. Reforms will require the use of approaches that take into consideration IG collaborations at the national and international levels in the areas of education, professional guidance, technical expertise, and programs that ensure food and health security by improving environmental conditions and public health infrastructure. Adaptive policies to address climate change will need preparedness and coordination among governments, communities and stakeholders of all ages to support settlements that may become affected, protect physical infrastructure, and in some cases, assist with migration. In this sense combating perils associated with climate changes now, and in the immediate future, is a major challenge for all generations.

Collective actions to promote IG dialogue have taken place in the area of education through service and community learning. This type of experiential learning allows students at any level (high school, college and graduate) to integrate an academic curriculum with reflective practice in real world contexts with persons from different ages. Service/community learning courses can be designed in a variety of disciplines from gerontology, sociology, economics, education, and social psychology to address IG communication, and generational conflict. They enable volunteers age 50+ to serve in schools and community-based organizations and assist with youth service activities and other educational programs. Schools and local communities are powerful settings for the interaction of different generations. Through community-based learning and curricular offerings older persons can lead class-discussions or serve as advisors and mentors while for example, younger students can teach computer classes, language or physical education to older persons. These interactions are a two-way stream that prepare young people to live and learn in multigenerational societies and provide older persons the opportunity to better understand and learn from younger students. Bringing persons from different generations together in academic and extra-curricular activities has enormous educational value and promotes the values of an IG society.

Institutional changes produced by either collective action or sanctioned directly by governments, can affect IG solidarity outcomes (positive or factual) and how people conceptualize their moral or social obligations to each other and the common good (normative). In Latin America and the Caribbean, traditional social security systems were established in the twentieth century based on the social-democratic principles of solidarity and redistribution. Some countries, such as Argentina and Chile, were early adopters, while Central American countries were late-comers. Social security pension schemes were partially funded or pay-as-you-go with defined-benefits and with social security offices working as clearing houses for IG transfers. In 1981, Chile privatized its

pension system and closed down the public social security scheme, thus eliminating the IG transfers of the traditional pay-as-you-go system. With the adoption of fully-funded individual pension accounts with defined contributions, workers rely solely on their personal savings and capitalizations of financial earnings for their retirement pensions. In the nineties, several other countries in the region adopted fully-funded individual pension accounts under various model options that give workers the possibility of deciding between the private and the public scheme (Peru), that supplement a basic pay-as-you-go public pension (Argentina) or a basic social pension (Bolivia and Brazil). In some countries a “solidarity tax” pays social pensions for pensioners whose individual pension fund is not sufficient to earn a benefit that is above the minimum pension guaranteed.

The privatization of pension reforms in Latin America ended IG transfers of the public-led pension systems. Reforms targeted fulfilment of development goals that were articulated in the “Washington Consensus” era and on market principles rather than on redistribution, IG transfers and solidarity. Reforms also responded to the tremendous deficits, inequities and corruptions that many social security institutes experienced. Introduction of personal pension accounts were deemed necessary to create a culture of long term personal savings, to structurally reduce public deficits caused by the actuarial disequilibria of old public pension systems, and to promote the development of domestic financial markets and the creation of domestic financial investors.

Two decades of reforms have shown mixed results. There has been an impressive increase in the size and sophistication of domestic financial markets and a reduction in public deficits that are highly welcomed. However, actual coverage of the labor force (formal and informal) has decreased due to the transaction costs of private pension programs that cause evasion and elusion. Some countries in the region are adopting further reforms that enable workers to enrol back in the public pay-as-you-go system after having opted for the private scheme (Peru). Others are implementing non-contributions pensions following the examples of Bolivia, Brazil, and Chile. A drastic move was taken by Argentina in 2008 in the spirit of resorting back to public control of the pension system. On the argument that the privately administered pension system was plundering, President Cristina Fernández nationalized the private pension scheme.<sup>4</sup>

### **Reciprocity and giving**

Through reciprocity people establish mutually dependent associations of influence and exchange. In contrast to market transactions that are determined by prices and usually motivated by self-interest, relations of reciprocity are voluntary and independent. Reciprocity characterizes families and communities that exchange services and goods under patterns of giving and receiving that are socially sanctioned. These exchanges are two-way transfers that are mostly oriented to attain a higher level of joint satisfaction instead of individual selfishness.

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<sup>4</sup> In 1994, Argentina privatized a portion of its public pay-as-you-go pension system, see Isuani, Ernesto Aldo and Jorge Antonio San Martino, 1998.

Giving differs from reciprocity in that it is a one-way transfer that is also voluntary, independent and it is oriented to the other person (Gérard-Varet, Kolm and Mercier Ythier, 2000). The motivations for giving are altruism, emotions, moral duty, norm-following, image-building, and sometimes, a person's self-interest in being perceived as generous and philanthropic (Kolm, 2000). Often, psychological and social motivations for giving and reciprocity are based on values and normative beliefs about social justice. Gift givers may feel that they ought to intervene in order to ameliorate market failures and unfair socio-economic and political processes that generate social exclusion. Even tributes, taxes and other contributions can be considered to be means to address poverty and inequality. Within the family, concern and care for the well-being of kin members mobilize different types of giving and reciprocities motivated by factors as varied as love, sense of duty, gratitude, obedience and justice. In some societies, philanthropy and volunteerism are encouraged by institutionalized incentives from community service requirements for school graduation to tax deductions for giving. In the United States, for example, financial giving under the form of transfer of private wealth amounts to between one fifth and one fourth of household net worth (Brown and Weisbenner, 2004, chapter 4) which is a sizable portion relative to other countries. IG solidarity has allowed people of all ages to address challenges and contribute to each other's reciprocal well-being, educationally, emotionally, financially, and through a variety of personal services and time-related resources.

### **Distributional and relational effects of IG Solidarity**

From a political economy perspective, it is possible to extend Bhalla and Lapeyre's analytical framework (2004, chapter 2) and identify two types of effects on IG solidarity, a distributional (economic) and a relational (social and political) effect. The distributional effect of IG solidarity is represented by the transfers of assets and resources among generations (giving) that enable access to goods and services that are needed for survival. Transfers can originate in income from work or financial and other assets; pension benefits, other transfers and gifts; and other income generating activities that individuals perform to function in society. Adequate levels of income throughout the life span are necessary and parents typically fund the consumption of their children until they become economically independent. There is a debate on whether they pay for their children's consumption because of altruism or because of self-interest or reciprocity (expecting a service in return). Pure altruism (the opposite of egoism) is equivalent to pure love without expectation of a pay-back. Some form of self-interest, which may be covered and subtle, seems to be frequent. It may be related to the notion of chain reciprocity by which grandparents helped parents and parents helped children and in return each generation will give some support or care to the previous one. The forms of distributional IG support vary geographically and historically and are also affected by the normative causes of IG solidarity and public policy. For example, in a study that compared motivational factors for parental transfers, whether altruism or self-interest (exchange), in a population of migrants to France, the authors found evidence that supports the altruism hypothesis (Wolff, Spilerman and Attias-Donfut, 2007). The same study showed that distance from the parental home does not reduce parental giving.

The relational impact of IG solidarity refers to social dimensions such as education, health status, property rights, norms, trust, political participation, civic engagement, representation, and other institutional factors that affect social relations and the political structure. Family life develops in specific and dynamic socio-economic contexts that affect how families function and the roles they have. Market economies in developed countries typically exhibit more economic exchanges and their IG solidarity is represented in the nuclear family, in the redistributive role of government through welfare and social assistance, and in volunteerism and philanthropy. In the developing world, a large portion of social interactions assume the form of reciprocity and giving within extended families in the absence of a strong public sector infrastructure that could support older persons and other vulnerable groups.

### **Intergenerational ambivalence**

Ambivalence results from conflicting or mixed feelings leading to uncertain or contradictory behavior. Sometimes people may not know exactly why they give or reciprocate, whether for altruism, self-interest or ambivalent feelings that oscillate. When adding the emotional ties that are implicit in family relationships, members of the same kin may feel closer to one or more members than to others and discriminate their giving and reciprocity accordingly. Scholarly work on IG solidarity and the diversity of issues that families and communities confront suggests, however, that another concept in the analysis of IG relationships is ambivalence rather than solidarity. Confusion on IG relations is explained by the plurality and diversity of family conceptualizations that affect patterns of care-giving, dependence and independence of family members, and the evidence that notwithstanding solidarity, communities are impacted by elders' neglect and abuse (Lowenstein, 2005) and by violence against children.

## **2. Main theoretical contributions**

### **Bengtson's IG solidarity concept**

The theoretical foundation of IG solidarity was developed by Dr. Vern Bengtson in the late 1960s and 1970s. He was interested in conceptualizing and measuring patterns of cohesiveness among three generations (grandparents, parents, and children) within the family. Since then, his research and that of his students and scholars influenced by his work, has led to the development of the field of IG studies that is profoundly interdisciplinary.<sup>5</sup> Antonucci, Jackson and Biggs, 2007 call Bengtson's model the "Solidarity and Conflict Model of Generational Relations" because it explains ties between and among individuals from togetherness and affection to conflictive relationships (see also Bengtson and Oyama in this volume).<sup>6</sup> Bengtson and his

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<sup>5</sup> A review of the literature on cohesion and solidarity is presented in chapter 1, Mangen, Bengtson, and Landry, Jr. eds., 1988.

<sup>6</sup> McChesney, Kay Young and Vern L. Bengtson, 1988. "Solidarity, Integration, and Cohesion in Families: Concepts and Theories," In: David J. Mangen, Vern L. Bengtson, and Pierre H. Landry, Jr. eds., 1988, chapter 2, conclude that: Solidarity is complex and multidimensional; too often, mechanical (positive) aspects are emphasized rather than organic (normative) solidarity; that conceptualizations of solidarity are not clear thus requiring additional critical analysis; and that it needs to be adequately measured.

colleagues<sup>7</sup> defined generational (that uses individuals differentiated by ranked generational position as the basic unit of analysis) and lineage (where several individual family members are linked into a single analytical unit with positions defined by genealogical status within the vertical family system) levels to measure cohesiveness of the family. They argued that there is often more solidarity from parents to children (downward relationships) and more conflict from children toward parents (upward relationships). Although various layers of solidarity may exist between and among generations, conflict and tensions are only natural (Bengtson, 2001). In fact, solidarity and conflict are manifestations of human nature and the complex balancing of bonding.

Bengtson's work has contributed in a profound way to our understanding of how generations live and feel. It has carved the path for important research on the positive dimensions of IG solidarity everywhere. The classical way of measuring solidarity that was established by Bengtson and Schrader (1982) includes six categories (see Bengtson and Oyama in this volume where these six categories are also presented):

- *affectual or affectional solidarity* - feelings of closeness among family members and the degree of reciprocity of these sentiments,
- *associational solidarity* - frequency and pattern of contacts and interactions in various types of activities,
- *consensual solidarity* - agreement in worldview, attitudes, values and beliefs among family members,
- *functional solidarity* - financial and non-financial exchanges among family members,
- *normative solidarity* - sense of obligation to care or perception and enactment of norms of family solidarity, and
- *structural solidarity* - cross-generational interaction promoted by geographic proximity.<sup>8</sup>

Bengtson and his colleagues' work have provided impetus for further empirical and theoretical research. They encouraged and recommended using measurements to assess these six categories, to develop measures to enhance assessments, and to continue theoretical progress and scientific research (Bengtson and Mangen, 1988). The development of the concept of solidarity in the family, the smallest social unit, was also extended to other groups and communities making the approach multicultural and multiethnic.

### **IG Solidarity as social support**

According to Antonucci, Jackson and Biggs, 2007, another important model of IG solidarity is the so-called "Convoy Model of Social Relations." Developed by Kahn and Antonucci (1980), this model uses the analogy of a "convoy" to illustrate people's propensity to form networks or associations. A "convoy" provides protection and support (either objective or subjective) and influences the person's health and well-being in the

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<sup>7</sup> See also Bengtson, Vern and Robert Roberts, 1991.

<sup>8</sup> See also Mangen, Bengtson, and Landry, Jr. eds., 1988, p. 23.

short- and long-term. The nature of the social supportive infrastructure is dynamic and flexible because both persons and society evolve over time. The security and protection that persons need to grow is the cornerstone of IG relationships. The “convoy” symbolizes this protective home base that is critically important.

Antonucci et al. (2007, pp. 681-685) consider three factors in the analysis of social relations and IG solidarity. The first factor is context, which is determined by life experience, relationships and well-being. These are, in turn, dependent on variables such as race and ethnicity, social and economic class, gender, age, national origin, religious and political beliefs, and processes of acculturation, particularly among migrants. Context is important because it provides the setting that affects people’s behavior. For example, children are taken care of by their parents or other caregivers; young adults get married and form new families; older persons require support and as they age, their interactions with peers decrease. Situations and life experiences are affected by the identity of an individual, who she is socio-economically, ethnically, culturally and so forth. For example, the care needs of an older woman who lives in poverty in a distant rural area and who has limited access to health care services differ greatly from the needs of a woman who is of the same age but who lives in an urban, middle-income neighborhood. Issues of migration, socialization and assimilation and how they affect the network of support are part of the contextual basis affecting the person’s health and well-being.

The second factor is the structure of generations, and how solidarity and conflict contribute to more or less social cohesion within the nuclear or extended family. The structure of generations refers to the number of living generations in a family, which in certain countries is increasing from the traditional three, child-parent-grandparent, to include great-grandparents. And then, there are issues associated with types and frequency of IG relationships in the family in any given context which depend on whether there is geographical proximity among generations, the affection, and caring needs that characterize families and cultures.

Finally, the third factor is individual and family outcomes. At the individual level, research aims to understand how stress affects the health and well-being of individuals including migrants and individuals of diverse socio-economic background, and who differ in terms of their race, ethnicity, gender or any other attribute. In terms of special groups, research goals include the examination of how people with common social and demographic characteristics eliminate or reduce their vulnerabilities or how they cope with chronic and acute vulnerabilities.

### **IG Solidarity and altruism**

In the economics literature, scholarly work on giving, altruism and reciprocity constitute theoretical translations of IG solidarity. From this disciplinary perspective, individuals are assumed to understand their environment and act rationally to maximize their own welfare given the predicted behavior of others (Ermisch, 2003). Cooperation between parents on how they allocate their private consumption creates an efficient allocation of expenditure for their child. Altruism, in economic analysis, is equated with

“caring” and “love” and caused by feelings of affection and empathy. It is also produced by moral values (normative) and rationality. The welfare of the altruistic person depends on the welfare of the beneficiary. The evidence on the motives that persuade parents to pay for what their children consume is mixed basically because it is difficult to completely separate caring and love from image-building, earning respect and wanting one’s descendents to do well. Self-interest in perpetuating the genetic content and cultural conditioning of one’s own descendents can be another normative motivation for altruistic behavior.

Individuals and families are free to decide how much they want to care for one another. Although it may sound paradoxical, motives for political and public choices in the area of social and public services usually imply both self-interest and altruism. The reason for that is simple: the nature of these activities is such that they concern social, moral, political, environmental, and other aspects of a society’s context about which people have their own individual preferences but also normative concerns about the common good and the good society. Some of these activities are of individual concern because people want them for themselves and for others. And there are other issues that affect the particular interest of individuals who get together under interest groups and in political actions of all types. “You favour and help them as they favour and help you – this is solidarity”(Kolm and Mercier Ythier, 2006).

### **IG Studies and the life-cycle**

A review of analytical approaches and of the rich and diverse literature on IG solidarity acknowledges the challenges inherent in IG research. It is clear that given the wide range of phenomena that is included in this research and the changing trends of dynamic relationships, the themes, conclusions and policy implications will be equally broad. The fact that a series of economic, demographic, political and social factors have converged to generate a focus of attention on IG relationships have given rise to interdisciplinary academic and professional studies in this area, also known as IG Studies.

Larkin and Newman (1997) argue that IG Studies is a new emerging interdisciplinary field that has grown out of IG programming carried out by practitioners in the fields of early childhood education and gerontology working in partnership in the 1960s and 1970s. IG programs are interventions that provide support or services to combined age groups by care-givers who rely on each other’s expertise and competence to make a positive impact. In 1963, the Foster Grandparent Program established in the United States the first federally funded program that created an interactive two-way scheme for low-income older adults and at-risk children and youth.

Since then, IG programming has expanded in meaningful ways: “Intergenerational programs have been developed as a vehicle to effectively connect older and younger generations by providing them with opportunities to develop meaningful and productive relationships. Additionally, they enable communities to promote civic responsibility, as an alternative to self interest. IG programs that have emerged during the past two decades are changing the way education is provided to children and youth, and how services are

provided to older adults and others in our communities” (Larkin and Newman, 1997, p. 7). Examples of programs are: in the area of education from pre-K through K-12 schools, trained older adults provide services as caregivers, mentors and resource persons; retired professionals serve as mentors and provide technical assistance in developing countries; community-based learning curricula in colleges and universities train students using real-world situations as labs to test theoretical propositions. These projects bring together instructors, undergraduate and graduate students and people of all ages. In health-care, older persons are helpers or volunteers who visit young patients and help them feel more at ease in health care establishments. In nursing homes, children and youth develop recreational activities for older persons. Other more ambitious IG programs are projects for multigenerational housing and recreational facilities. In all of these examples, there are mutual benefits for both younger and older persons.

Proponents of IG Studies as a new academic discipline contend that, similar to gerontologists who specialize in the study of the life and needs of aging people, professionals in IG programming and learning are needed to address the increasing demands of social interactions and exchanges among multi-age populations in the twenty-first century. It has been argued that professionals graduating with a degree in IG Studies will be needed to develop careers for working with young people or older adults in schools, long-term care settings, community organizations, non-governmental organizations and government offices that provide services to young and older persons. The training of these professionals should be part of an IG Studies academic programme that would be genuinely interdisciplinary i.e., education, human development (early childhood, child and adult development, life-span) and gerontology, with a strong experiential component and an equally strong partnership with the community. The argument set forth is that IG Studies has already created a distinctive body of knowledge; can be housed in schools of education; combines and integrates research, professional practice, curriculum design and programme evaluation; offers a variety of alternative academic learning options and outcomes; involves the participation of faculty from related disciplines; and promotes strong community partnership in its development and implementation (Larkin and Newman, 1997, pp.12-14).

Others, however, consider that it may be too early to establish IG Studies as a stand-alone academic discipline but that eventually it may acquire independent academic status. Rather, the field should remain as an interdisciplinary programme analogous to environmental studies, gender and women studies or the comparative study of race and ethnicity. Rosenberg, Layne and Power (1997) agree that both gerontology and IG Studies grew out of a need to provide services to vulnerable populations. In the case of gerontology, it was necessary to create a body of knowledge and skills to understand the developmental processes of aging and provide guidance to the creation and management of field community programs. Gerontology developed into an academic discipline in the 1920s and was stimulated in the 1960s and 1970s with United States federally funded career training grants and the creation of multidisciplinary centers of aging (Rosenberg, Layne and Power, 1997, p.22). According to this view, IG Studies courses can be part of a gerontology degree the same way courses on demographics and the life-span are either integrated into the syllabi of existing courses or established as an area of concentration

within gerontology. Responding to Newman (1994) who considers that the time has come for IG Studies to become a viable discipline with a solid theoretical framework, Rosenberg, Layne and Power (1997) state: “But IGS [intergenerational studies] is still busy building the solid empirical knowledge base and literature necessary to a scientific discipline, and much of the literature is not theoretically grounded. As has occurred in other disciplines, this “first –generation” knowledge/literature base emerges from the less rigorous, less systematic, less representative, more speculative and relatively untested works indicative of a nascent field. Similarly, the methodologies and vocabulary evident in IGS literature are drawn from other disciplines and fields of study. Perhaps most importantly, “attempts to build a unique theoretical framework are still in their infancy” (Rosenberg, Layne and Power, 1997, p.27).

Debates about the timing of an independent academic discipline of IG Studies show growing need to create more research and expand the knowledge base for IG learning and IG studies through the establishment of disciplinary degrees. The latter would endorse and legitimize careers in IG programming. While initially IG Studies evolved from gerontology concerns and questions, the field has been evolving and now encompasses human development and the life-span of which gerontology studies is one component. There has been a paradigmatic shift away from sole concentration on a particular age group, i.e., young children, youth and older persons, toward increasing interest in the design of programs and approaches that combine and integrate developmental aspects throughout the life-span.

### **3. A model of IG solidarity**

IG solidarity finds its expression in support and care giving among persons from different generations. In this section, care giving is analysed in the context of IG solidarity representing its pragmatic side. Two types of societies, traditional and modern, will be highlighted as opposite poles of a care-giving continuum.

In traditional societies, the family functions through kinship networks and is based on marital heterosexual union. Notwithstanding the complexities of rigid generalizations, it is possible to say that values and morals in these societies often promote the sense of togetherness and mutual care giving. Most often, women are main care givers for small children, older persons, the sick and persons with disabilities. This function can be daunting within extended families but particularly so in instances when women work outside the household. As societies industrialized and modernized, family structures began to change, fragmenting and leading to a situation where members found themselves without a crucial social network. As result of structural changes and ensuing dismembering of extended families, the traditional system that formed the basis for informal family and community based care eroded.

In modern welfare states with well developed social protection programs, income security and care giving are provided through a variety of programs and institutions from publicly funded social assistance and non-for profit establishments to private, for profit organizations specializing in care giving. These services are intended for children, older

persons, sick persons, persons with disabilities, and other persons who need to be supported and for whom family members can not provide care directly. In contrast to traditional societies, an important portion of care giving has moved out of the home to specialized care givers. There is, however, still a lot of care giving at home, particularly to children. And as women have increasingly joined the labor market, families are more dependent on communities in which they live for the provision of care for both young and old (see Larkin in this volume).

In developing countries there is no easy replacement for family support that is waning. In Sub Sahara Africa, HIV/AIDS and civil war have altered the pattern of IG relationships as the middle generation has been decimated. On an increasing scale, grandparents provide care for their orphaned grandchildren, and there are many cases where the eldest child in an orphan family provides support to siblings (see Oduaran in this volume). In other African countries, the establishment of cash crop economies and other economic transformations has led to major social changes that include disintegration of the traditional families, increase in the number of female-headed families and in the number of divorces. The effect is that the support that the traditional extended family used to provide has declined considerably (Oheneba-Sakyi and Takyi, 2006 and Oduaran in this volume). In many Latin American countries, including Brazil, Mexico and Peru, conditional cash transfer programs are geared at supporting mothers and children and pulling them out of poverty. The lack of a solid web of social assistance programs in these societies puts vulnerable persons such as children and older persons in a precarious situation.

For simplicity, it is possible to think of care giving along a continuum that goes from family care giving or the private sphere, to institutional care giving by governmental institutions or organizations (for profit or not-for-profit) in the public sphere. In the private sphere, families (based on nuclear, extended, kin or quasi-family relationships) fulfil care giving functions to each other and to their immediate neighborhoods and communities. These services are based on solidarity (often IG) and in the longer run provide much needed cohesion. Over time, as societies evolve and become industrialized, care giving moves away from the immediate households due to the increased mobility of families, their restructuring, and the increased numbers of women leaving home and joining the work place. More and more, care giving moves to the public realm, to organizations outside the home, and eventually, to the market. The latter is true in more advance countries where care-giving for older persons, for example, can be delivered by professional institutions working for profit..

The above described continuum is presented as an idealized representation only since societies do not necessarily move from the private sphere to the public sphere in lineal manner. And often, in the case of developing countries, they have moved from the private sphere to positions of mixed presence of social security programs for a small portion of the population (usually salaried labor force and their dependents), professional care giving for a small segment of affluent persons, and informal community based and family based care giving that is unstable and inadequate giving the context of poverty in which care givers live.

It is useful to underscore the unique role that government plays in the public realm. Governments are expected to be responsible for the support and care of all members of society, guarantee their physical integrity, and formulate and implement social policies in partnership with non-government actors. They set social integration benchmark goals and develop the capacity to guide and monitor progress. In developed countries, governments administer a diversity of programs that ensure a basic level of well being and social protection. In developing countries, this quest is often elusive.

Building on the three dimensions of society presented in section 1, namely the normative, the positive and collective actions, one can think of society as a circle with concentric inner circles each representing a separate dimension, from values (red circle), facts (blue circle) to collective actions (red circle). Societies are constantly evolving and these three dimensions interact constantly. In figure 1 society, as a whole circle, moves as if it were a pendulum from the private to the public sphere along this idealized continuum. This movement, indicated by the grey arrows, is an outcome of structural changes in the social fabric that are linked to socio-economic development and institutional shifts. It shows how care giving moves beyond the family to other social arrangements that may include combinations of community care and some social assistance programs or to the main use of social services if the pendulum were to swing to the far left.

(insert figure 1 approximately here)

Presently, welfare states are facing sustainability challenges due to aging, sharp fertility decrease, and high public debt. In Greece, Spain, Portugal, and Italy, the introduction of parametric reforms are aiming at cuts in transfers and more stringent eligibility conditions for benefits to alleviate the financial burden of publicly led social protection programs. In the United States, where the welfare system is relatively less generous compared to some European countries, the social security system is also under a lot of stress. In addition, both in Europe and in the United States, it has become apparent that care giving can be provided by family members if enough incentives are in place. Families with small children can be supported in ways that could reverse the drop in fertility rates and at the same time, allow children to grow in a stable and loving environment.<sup>9</sup> Similarly, working adults could be better prepared to care for their aging parents if governments were to acknowledge financially their caring role. These and other examples about caring functions for persons with disabilities and chronically sick persons are situations that are prompting stakeholders to advocate for policies and programs that can bring back the family or tight communities of friends to their traditional roles of main care providers. In figure 1, this move is represented by society swinging back from the public sphere pole toward the private one.

The sole purpose of figure 1 is to model in a simple manner the steady evolution of society driven by changes in ideologies and values, outcomes of social policies and interventions to affect care giving and IG solidarity, and the impact of advocacy and

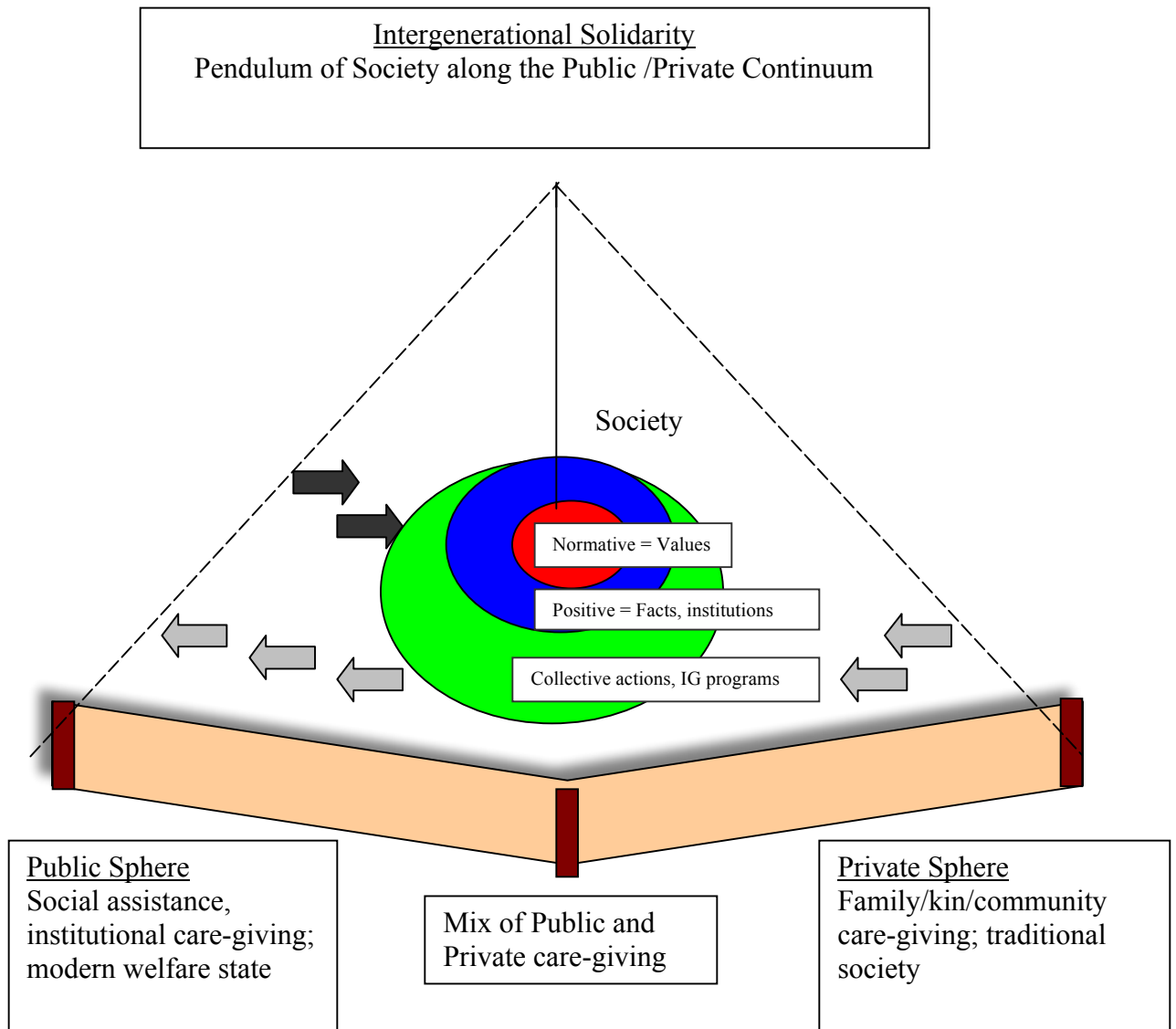
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<sup>9</sup> These family (and parenting) programs exist in many Northern European countries.

efforts to address care giving needs. More importantly, figure 1 also aims at representing how the basic function of care giving, the quintessential evidence of IG solidarity, has moved outside the realm of the home and the family. It shows that although IG solidarity may have been built into the "pay- as- you- go" social security systems where younger active workers through their contributions provide benefits for retired older persons, relationships and caring have become more professional and detached. There may be additional value in this new paradigm as tensions and conflict from within family interaction has been suppressed. At the same time, in cases where the dismembering of family has not been supplemented by effective institutional care giving, vulnerable persons, a majority of the population in developing countries, render a net loss.

Clearly, societies with weak governments and institutions face enormous challenges ahead. Their family structures that used to provide care to persons in need have eroded. And, in contrast to welfare states, social protection systems have not developed enough to hold vulnerable persons and adequately support them both at the beginning and at the end of life as well as through sickness and other types of need. Adding to this complex situation, societies are also facing major demographic and socio-economic processes that they will need to manage satisfactorily. I shift now to a brief review of the nature of these unfolding processes.

Figure 1



This diagram shows how society moves from traditional care giving for children and older persons within the family and kin to institutional care giving provided by professional social workers. Like a pendulum, societies that are dynamic wholes affected by values, institutions, and interventions, can move back to a mix of family care-giving and public support when adequate IG programs are in place.

#### **4. Poverty and inequality, jobs and aging**

Societies today are facing numerous challenges, including pressures from climate change and natural disasters, and the effects of the 2008 global financial crisis that originated in the United States. In what follows, I will focus on three long term processes only. They are: the global incidence of poverty and inequality, rising job insecurity, and accelerating aging.

##### **Poverty and inequality**

In a world of rapid socio-economic and technological changes that have disrupted traditional relationships,<sup>10</sup> more and more people are experiencing an unprecedented process of social dislocations, often leading to greater vulnerability of different segments of society. The distribution of income, assets and opportunities is becoming more skewed. One fifth of the world's population still lives in poverty. Poverty reduction efforts and employment generating programs attempt to eliminate the causes of poverty, but despite these efforts, a large number of communities struggle to provide care to their vulnerable members with increasingly less resources and more institutional constraints. In addition, economic insecurity and new challenges of a long-term nature associated with climate change are spreading, particularly in the developing world (United Nations, 2008). A study on international and global inequality found that in 1960, there were forty-one rich countries of which nineteen were non-Western. Four decades later, there were only thirty-one rich countries, and only nine of them were non-Western (Milanovic, 2005, p. 65).

In view of this, developing countries need to implement pro-active social policies to end poverty and reduce inequality. They, however, have felt the pressures of keeping their public budgets under control to promote financial stability and economic growth. To maintain fiscal balance, governments have reassessed their social policies seeking cost-effectiveness and efficiency that has led in many cases to reforms in the area of social protection. These reforms have sought to give the market greater role in the provision of social services such as health care and pensions. Evidence shows, however, that social provision channelled through the market and wider use of market instruments can only partially replace public social provision. For example, private insurance policies—the pillar of social protection through the market mechanism-- can only be purchased by those who can afford payment, usually formal salaried workers. This leaves a broad segment of society, mostly informal and rural workers and their families, without the needed coverage for health care, disabilities, old age, professional training and unemployment.

##### **Job insecurity and labor markets**

The 2008 global financial crisis increased unemployment everywhere, but proportionally more in developed countries. Two-digit unemployment rates in Europe

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<sup>10</sup> Among grandparents, parents and children due, for the most part, to geographical separation.

and close to 10 per cent in the United States added to concerns about creating job security in a world that is increasingly more competitive and flexible. In the developing world, more than open unemployment, the main issue is productive and stable job opportunities and the reduction of low-skilled informal work. Youth employability and the training of young persons for jobs that do not exist at the present time is one of the critical areas for social policy.

The earlier younger workers obtain gainful employment and insert themselves productively in the labor market, the higher the likelihood that they will build a strong foundation for lifelong work. Programs and community based networks that link families, religious and youth organizations, and firms in support of internships and contracts for recent graduates constitute important strategies to increase youth employment. Mentoring, apprenticeships, and training programs for young workers are also effective tools to facilitate entry into the labor market (See Mazza in this volume). In some cases, pressure is exerted on senior workers to leave their jobs to allow greater job mobility. But weak social protection systems, particularly in the developing world, push them to continue in their jobs for as long as they can afford to work.

## **Aging**

In an aging world where people are living longer new demands for large-scale health and pension schemes are emerging. This is a major economic challenge that practically all societies are facing or will be facing soon. In the United States, precautions are being taken to meet this challenge but its extent and the proposed reform programs are varied and often, they depend largely on shared values as much as on economic forces (Shactman and Altman, 2002). Health care and pension programs are vital and access to them through employment and contributions payments constitute one of the main social protection pillars.

Antonucci and Jackson (2007) state: "It has become clear that as life expectancy increases, the number of generations within each family is increasing, while the number of people in each generation is consistently decreasing." This process is happening everywhere, including the developing world where the pace of aging is rapidly accelerating. The developed world has been aging for quite a while, but its high income level helps find solutions in a more flexible way. The story is completely different for the developing world that has not been able to accumulate necessary resources to meet the new needs due to aging.

Aging and longer life spans are transforming the age structure of societies from a triangle into a rectangle (Bengtson and Lowenstein, pp. 6-9). This transformation shows that the proportion of children, young, middle-life and older persons very soon will be approximately the same. With continuous decline in fertility rates and rapid growth of older cohorts, the age structure of the population will eventually become a polygon with a shorter base and a larger top. Hence, dependency rates will rise substantially, with the predictable result that fewer adults will need to provide care for an increasing number of older persons. In developing countries, a large proportion of older persons with no

income security will need care services, but their extended families will be increasingly less capable of supporting them.

## **Conclusion**

IG solidarity is admittedly a relationship that is resilient and only natural today as it has been historically. The needs of our time are such that collaborations among generations are of paramount importance to find solutions to pending issues and craft a future of greater social cohesion. Many efforts from local and global leaders are unfolding and some collective actions are inspiring because they are leading to awareness about the needs of young and old persons, persons with disabilities, sick persons, and other vulnerable groups. Actions are needed from community based organizations to the legislative and executive levels to adopt the kind of IG lenses that lead to adequate social policy. The field of IG studies is growing and the literature on the normative and positive levels of society as well as on collective actions is expanding. It is expected that IG professionals will continue to plan and implement programs that put generations together.

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