Editorial

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Giants of the 21st Century: Population Ageing and Intergenerational Justice

Seventy years ago in 1942, William Beveridge identified 5 giants of the mid 20th Century—want, disease, ignorance, squalor and idleness. As we approach 2012, the JPA has commissioned 5 thought pieces which will address the new giants of the 21st Century and how the future demographic change of this century will impact upon their development over the coming decades. All have at their centre inequality—inequality within countries, inequality between regions, and inequalities between generations. The first three pieces have considered inequality and disability, health, and poverty. The fourth thought piece turns to issues around population ageing and intergenerational justice.

The filial obligation of generations towards each other and for a just society has been and is enshrined in societies' moral codes. In many African societies these norms are expressed in traditional proverbs, for example this Ghanaian one (Nukunya 1992; Apt 1996:22):

When your elders take care of you while you cut your teeth, you must in turn take care of them while they are losing theirs.

Such an implicit contract between the generations is based on the basic principle of intergenerational reciprocity where adults provide for younger dependents (children) and in turn those younger generations, when they become adults, provide for older dependents (the elderly). This contract is maintained—at least up till now—in different configurations on two levels: the basic familial level where parents are expected to provide for their young children and children providing for elderly parents, and the more sophisticated (institutionalised) societal level where adults within the labour market provide education, health care and different forms of income support through public transfers to both older and younger dependents.

However, the continued increase in longevity accompanied by the persistent decline in fertility, entail that the population structure of developed as well as

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developing regions across the globe may dramatically alter over the course of this century with challenging implications for the relationship between the generations on both the familial and societal levels. Indeed the pace and scale of ageing over the next decades leading up to 2050 are immense. According to the United Nations (UNPD 2012) forecasts, the population aged 60 years and over is expected to increase from 5 % to 10 % in the least developed regions, from 8 % to 20 % in the less developed regions, and to more than 30 % by the year 2050 in the more developed regions. In the developed world, for example, there are now relatively large birth cohorts in mid-life that have lower fertility and a higher healthy life expectancy than their parents. The entry of these large cohorts into old age will, considering current models of retirement, generate an initial sharp increase in old age dependency ratios in what could be described as a ‘demographic shock’ (see for example Batini et al. 2006). It is against this background that Harper (2011a) suggests an *age-structural transition* perspective, which allows for monitoring, not only the cohort composition but also the changing relations between providers and dependents (both younger and older).

This poses the core question whether increasing larger older cohorts, who reduced both fertility and mortality, should pass the cost of such a reduction on to increasing smaller future younger cohorts? Or, should older generations themselves carry the costs of their successfully attained longevity by, for example, substantial post-retirement contributions to their own health and social welfare and/or a longer working life? Also; keeping in mind that older generations more than often take on downward support responsibilities for their children and grandchildren (as for example found in the context of poverty and HIV/AIDS), the question is raised of who will care for older carers when they are themselves in need of care after a lifetime of caregiving (see Barrientos et al. 2003). To what extent should the interests of future generations and the past investments of older generations be taken into account? These pertinent questions on how to realistically achieve a just society for all ages should be addressed against the backdrop of a broad range of possible configurations and reconfigurations of the generational contract within diverse contexts. Ideally these contracts should capacitate individuals and societies with the kind of life that, to paraphrase Sen (1999:10), all generations ‘*have reason to value*’.

It is at the interface between the normative ideal of reciprocity and the actual empirical reality of global population ageing that equity between the generations towards social inclusion has to be negotiated and managed (Plant 2007). The challenge for policy and its subsequent programmatic interventions is thus to bridge that space between the ‘normative’ (i.e. ideal) and the naturalised (i.e. real-life) aspects of the social contract. Two such examples of important policy considerations, spanning both the societal and familial levels, relate to the enabling of capacity for (i) the mutual distribution of resources and (ii) solidarity between the generations.

One of the major policy challenges relates to the distribution of resources and is to enable individuals to maintain their health and productive capacity for as long as possible. This is crucial in terms of the channeling and transferring of resources and support from working generations to dependent younger and older generations. Population ageing is bringing about such large changes in the relative size of these generational groupings that policy-makers have to take into account the specific needs of different age groups in relation to each other and to reassess the workings of the institutions that channel public resources and support between generations.

Declining fertility, moreover, affects the collective capacity of society to provide these goods and assist with the problems that face the ageing individual. With a scenario of fewer young people, increasing skills shortages and a large proportion of older generations, the labour market will have to adapt to train and reskill older workers and at the same time consider adjustments to address/ how to manage the increasing demands of flexible working patterns. The challenge with regard to intergenerational justice will be whether a balance can be struck between the allocation of resources to the generations according to their needs and how to organise it in terms of the restructuring of working arrangements and education/training (particularly the balance between investments in early education and adult education and training—see Harper 2011b).

In generating solidarity between the generations, intergenerational learning, within both the familial and societal contexts, will become an increasingly important medium. This will be particularly important in view of the increasing verticalisation of family structures, the result of the combination of an extended lifespan and the existence of fewer younger family members due to lower fertility, which then has as outcome a narrowing down of the more recently born generations (Bengtson et al. 1990; Harper 2006). Both verticalisation and increasingly complex family structures (reconstituted new family forms) will have specific implications on the position of generations in relation to each other. More generations will share their lives with each other than ever before, with multi-generational bonds beyond the household, particularly between grandparents and grandchildren. It is in this context that generations, although sharing each other's lives, can be so removed from each other's worlds that it is almost impossible to mutually imagine the 'intergenerational other', their values and needs. This asks, as suggested by Jessel (2009), for multi-way intergenerational learning where understandings can be developed mutually rather than primarily in one direction. Such intergenerational learning may then advance intergenerational intelligence which entails *'...an ability to reflect and act, which draws on an understanding of one's own and others' life-course, family and social history, placed within its social and cultural context.'* (Biggs and Lowenstein 2011: 2). It is in essence about a constant mutual 'regeneration' of generational awareness on both familial and societal levels.

As societies attempt to successfully adjust to population ageing, translators of the ideals towards a just society for all ages will be required to manage both age diversity as well as the synergy between the generations. It is further crucial, as is also suggested by Harper (2011b), that these ideals should speak to the actual capacity of individuals, households and institutions to make the relevant adjustments in relation to intergenerational transfers and investment in human capital. Intergenerational justice, or the avoidance and/or mitigation of inequality between the generations, will be sustained by this dual approach of the mutual distribution of resources and facilitating solidarity between the generations.

Notwithstanding utopian overtones, another African proverb *'I am because we are'* challenges individualistic and age-segregated notions through the concept of *ubuntu*. *Ubuntu* is a Xhosa word referring to a collective human solidarity and a collective morality *'... of co-operation, compassion, communalism ... respect ... with emphasis of dignity in social relationships and practices.'* (Mokgoro 1998). In view of population ageing these existing collective goals, like those of *ubuntu*, may require

crucial adjustments in line with contemporary and future naturalistic contexts but nevertheless underscore the ideal of intra and intergenerational fairness and social cohesion.

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