

CHAPTER 6

POPULATION AGEING, INTERGENERATIONAL SOLIDARITY AND THE FAMILY-WELFARE STATE BALANCE : A COMPARATIVE EXPLORATION

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1 - INTRODUCTION - CONCERN FOR INTERGENERATIONAL SOLIDARITY

The ageing of populations is a challenge to intergenerational solidarity both privately in the family and publicly in society. Warnings have been raised about family as well as societal solidarity: Will families be able to balance between the needs of older and younger generations? Will societies be able to maintain the generational contract on which the welfare state is based? The concern for intergenerational solidarity is usually located in the younger generation, looking up generations: Will the younger continue to support the older? In the larger societal context, this is a question of the willingness to contribute to the common good via taxes, and to support a redistribution of resources to benefit those in need. Within the microcosmos of the family, the question is whether adult children will be willing and able to support their older parents.

Intergenerational solidarity may also be seen from the other side, that of the older generation(s) looking down. We need both perspectives, including that the older generation is not necessarily, and certainly not always, a burden on the younger. Older people contribute to families and societies, and they care for themselves as long as they possibly can, and they do so longer now than before. We therefore need to add a supplementary perspective to that of the younger generation. Intergenerational relationships are constructed from both sides, and we should be equally interested in how the ageing of populations may impact on the older generation as well as on the younger. The assumed impact of the demographic trends need then not be so obvious. Parents are net providers vis-à-vis their children most of their lives, and they tend to protect their children also when they themselves are in need. And clearly, parental expectations and preferences are likely to impact on how their adult children will behave.

Concern about family solidarity is an old story, and possibly an inherent feature of the parent-child relationship, but intergenerational tension plays out with a great variation in form and intensity over time. Family concerns are often expressed as some form of nostalgia for a noble past when families were strong and really cared. According to a Eurobarometer survey, substantial majorities of most European populations (within the EU area) are of the opinion that people and families “were more

caring in the past” (Walker 1993, Daatland 1997). Today’s problems are often blamed on modernity and increased individualism: Things were better before, and modern man has grown narcissistic and self-centred. Some see the welfare state as part of the problem, because the (generous) welfare state may have reduced the necessity, and therefore the motivation, for solidarity. This is what Wolfe (1989) characterizes as the “moral risk” of the modern welfare state.

Concern about societal solidarity, i.e. between younger and older age groups in the population, is also an old issue, but may have become more fraught in recent years in response to the ageing of populations. The change in the balance between older and younger age groups represents an increased responsibility for the younger generations, and the recent welfare state containment policy of many countries has added to these burdens by pushing more responsibilities onto the family. When resources become more scarce, conflicts tend to increase. People may respond by giving priority to their closest others, e.g. the family, while solidarity with “the universal other”, a key prerequisite for an inclusive welfare state, may come under pressure.

Thus intergenerational solidarity may be threatened under population ageing both within the microcosmos of the family and the macrocosmos of the society. There is, however, no consensus about trends and implications, or about what kinds of factors are the most influential and how they function. Is, for example, increased individualism a risk or a resource for solidarity, and is family solidarity a risk or a resource for societal solidarity? The importance of intergenerational solidarity for both families and societies, the impact of demography on solidarity and vice versa, and the knowledge gaps in these areas were among the motivations behind the Generations and Gender Programme (United Nations 2005, 2007).

This paper addresses these issues in three sections. The first section reviews earlier findings and theorizing in the area. The second section presents empirical findings and preliminary analyses of data from the first wave of the Generations and Gender Survey (GGS), and the third and final section discusses some future perspectives.

2 - REVIEW OF EARLIER STUDIES

2.1 Family solidarity

Amato (2005) identifies two positions as far as research on intergenerational family solidarity is concerned, the family decline perspective and the family resilience perspective. Both have long traditions, but they have differently roots.

The historically long lines of the family decline perspective may be illustrated with a quote from Ethel Shanas from nearly 50 years ago, which sounds fresh even now and could have been stated today in more or less the same words: "There is a widely-held popular belief that affectional and other ties between older people and their families are weaker now than they were at the turn of the century or at other times in the past" (Shanas 1960).

These beliefs have substantial support in public opinion also today, and have received renewed support in recent years from the critics of late modernity. The family decline perspective is indebted to Talcott Parson's ideas about family functions being taken over by other societal institutions in modern society, and thus reducing the importance of the extended family (Parsons 1955). Among the implicit assumptions are possibly also that self-interest has a tendency to expand when given the opportunity to do so. Solidarity and other collective ties are seen as rooted in external pressures, such as material necessity or strict social norms (duty), and are so to speak burdens that people want to escape if they can. The benefits and attractions of the extended family and other social constellations, such as the neighbourhood or the society at large for that matter, are thereby not recognized, or at least under-communicated, but clearly there is more to the (extended) family than duty, and there is more to society than tax bills.

The contrasting family resilience perspective recognizes this, and finds the modern family still attractive and vital, and to include even the older generation beyond the nuclear unit. While the family decline paradigm is rooted in Parsons and family sociology, the family resilience position is rooted in gerontology and the many ageing studies that found resilient and close relationships even in modern societies (cf. Shanas 1960, Connidis 2001, Bengtson et al. 2002). Within this tradition, probably the majority would still concur with Shanas's statement

of 50 years ago, "Empirical evidence ... indicates that family ties between older people and their children are still strong and still functioning".

2.2 Societal solidarity

There is controversy also as far as intergenerational societal solidarity is concerned, in this case between solidarity optimists and solidarity pessimists. Solidarity pessimists tend to blame what they see as a decline in societal solidarity on the increasing individualism of modern society. People become more self-centred, or they may seek refuge among close others such as the family. Thus the collective "we" may have narrowed to an inner circle of one's own kind, while solidarity and integration to the larger population and the general other may be lost.

Optimists claim to have considerable research evidence for a still high level of societal solidarity, as indicated by strong and stable popular support for the welfare state and the taxes to sustain it in most European countries (e.g. Taylor-Goobie 2004). This support is, however, not unconditional, and is particularly strong for welfare benefits to elders. Older people are scoring high on "the deservingness scale"; they embody, so to speak, "the honourable client". Older people's needs are therefore – more than most others' – recognized as deserving public support, because they are not blamed for their misfortune, which is often the case for the unemployed and immigrants (van Oorshot 2002). People also find it easier to identify with elders than with other groups in need, as they will often have older relatives, and know that they themselves will become old in the near or distant future. Thus older people may be better protected than many other needy groups, but the future strength and resilience of these ties are still uncertain.

2.3 The family-society interaction

There is a considerable body of empirical research on intergenerational solidarity in the family and in the society at large, but far less research about the relationships between them, for example the extent to which family solidarity also encourages solidarity at the societal level – or on the contrary, whether the two represent competing loyalties. In support of the first argument are ideas about solidarity being learned and internalized within the intimacy

of the family and thereafter generalized to larger and more distant social circles. An alternative – and negative – connection between family and societal solidarity may also be assumed, for example, when a lack of trust and solidarity in the public sphere may motivate people to protect themselves within smaller and more intimate social groups, e.g. the family. If so, societies characterized by low social capital, a lack of mutual trust, and thus low solidarity on the societal level, may then be characterized by a tight and protective family culture. Influences may also work in the other direction, for example that societies characterized by tight and protective families (or clans), may find it harder to attract support for solidarity beyond the family (or clan).

GGs allows us to explore issues like these, as it includes measurements on both types of solidarity and thus the interrelationship between them. The survey includes countries with different welfare state regimes and family cultures, and is based within a longitudinal design that helps us disentangle causes and consequences. The next section presents preliminary findings from GGS about the character and strength of normative intergenerational solidarity, i.e. about the norms and ideals people in different GGS countries hold concerning the distribution of responsibilities between the family and the welfare state, in this case the responsibility for elders on one hand, and responsibility for children on the other.

3 - PUBLIC OPINION ABOUT THE FAMILY-WELFARE STATE BALANCE

3.1 Introduction

Knowledge about norms and ideals is important for several reasons. For one thing, ideals tend to guide behaviour and may therefore help us understand why people behave the way they do. Secondly, public opinion may serve as a source of information about the responsiveness of policy and therefore of democracy: Is policy in conflict, or congruence, with public opinion?

The theoretical reasons for focusing on these issues are to be found in both welfare state studies and in family research. Welfare states vary in levels and therefore in the balancing of responsibilities between the public and private sectors. Welfare states also differ in profiles – in how the resources are distributed. This diversity cannot be attributed simply to differences in needs and resources; it is also produced by differences in traditions and politics (Anttonen and Sipilä 1996, Daatland 2001). For example, Scandinavian welfare states tend to give high priority to services (care), while countries like France and Germany give more priority to transfers (cash). Welfare states also differ in the balancing between elders and non-elders. Countries like Italy and Austria tend to give priority to elders to the extent that they may better be called “pensioner states” than “welfare states” according to Esping-Andersen (1997).

Diversity may also be the case as far as public opinion is concerned. Therefore, this section examines within and between country variation in public opinion about family and welfare state responsibilities. The respondents were asked to

state their opinion about how responsibility for care and financial security for elders and children should be divided between the family and society: e.g. whether the society (here taken to represent the welfare state) should give priority to transfers or to services, to elders or to children. Finally, and within the family context, public opinion about priorities up and down generations is examined. The findings presented thus refer to ideals more than realities (actual behaviour); they illustrate what people see as the right thing to do, not if they actually do it. The GGS data set also enables us to study how attitudes and behaviours are related, which will be among the themes for future analyses.

The family-welfare state balance in public opinion is expected to reflect differences in actual policies, and therefore to differ between the more publicly oriented Scandinavian welfare state and the more familistic regimes of countries like France and Germany. Georgia is expected to be even more family-oriented in values and policies. The countries differ both in culture and in policy, which makes it difficult to assess the extent to which the observed differences reflect structural differences of opportunity or motivational differences rooted in culture. As welfare state responsibility tends to be more general for financial security and transfers, while care – in particular care for children – is more likely a family matter, we also expect these positions to be reflected in public opinion. Thus welfare state responsibility is in general assumed to be higher for cash (transfers) than for care (services), and higher for elders than for children.

3.2 Theoretical perspectives

As for the priorities within families, the presentation is informed by four theoretical positions which suggest different priorities up and down generations: the intergenerational family solidarity paradigm, the developmental stake hypothesis, social exchange theory and the intergenerational ambivalence model.

The **intergenerational family solidarity paradigm** sees solidarity as multi-dimensional and expressed as interaction, affection, mutual help and obligations (normative solidarity). Family solidarity is seen as still strong and to include also the older generation (Bengtson and Roberts 1991). Thus filial norms oblige the younger vis-à-vis the older, and therefore priorities up generations are expected to be comparatively strong.

The **developmental stake hypothesis** (Giarusso et al. 1995, Shapiro 2004) assumes that parents have invested more in the relationship than children, and are therefore more committed to it. Children have then higher priority to parents than the other way around. Parents are therefore more strongly motivated to protect the relationship, and may do so by de-obligating children and supporting filial independence rather than obliging them and being a burden on them, as the saying goes. This attitude may also be rooted in parental and protective norms vis-à-vis children, or more generally may be anchored within a generative attitude, which according to Erik H. Erikson develops in the mature and later phases of life (Coleman and O'Hanlon 2004). Thus the developmental stake perspective assumes a comparatively strong priority down generations.

According to **social exchange theory**, people try to maximize benefits and minimize costs. The modal strategy for both parties in a relationship would then be to repay benefits received and to negotiate a balanced relationship between giving and receiving. The best strategy would therefore be to develop a balanced relationship, or even be a net provider if possible, as it usually feels better to give than to receive. The reciprocity norm, on the other hand, demands a return of benefits received, either in the here-and-now or in the longer run, for example, when older parents expect adult children to pay back the help they received earlier in life (delayed reciprocity). This is expressed in the idea of a support bank, where earlier investments may

be drawn upon later in life and outbalance the feeling of inadequacy that the receipt of help would otherwise incur (Antonucci 1990). Thus social exchange theory points in different directions, towards either a balance between generations, or a priority up generations, as the older may expect a return from the younger.

Finally, the **intergenerational ambivalence model** has criticized the family solidarity perspective for being biased towards a family harmony image. According to the ambivalence model, intergenerational relationships are best described as ambivalent, characterized by mixed feelings and conflicting commitments (Lüscher and Pillemer 1998, Connidis and McMullin 2002). Parents, for example, try to raise children as both independent and obligated, and children tend to respond in kind, by trying to balance autonomy and commitment. Thus solidarity is not universally expressed, but is conditional on the context, depending on negotiation between the parties, and increasingly so in modern society (Finch and Mason 1993). In modern times, family relationships have changed from being governed by strict, external prescriptions for behaviour to being guided by more general guidelines, open to negotiation between the parties when circumstances change, e.g. when women increasingly join the paid labour market. The ambivalence model too may point in different directions as far as priorities up and down generations are concerned, but suggests a special priority for the nuclear family, and then to priorities down generations.

These four theoretical perspectives are to some extent alternative positions and to some extent supplementary ones, and may have different relevance under different family traditions. Family cultures vary geographically in Europe according to Reher (1998), with stronger and tighter family ties in Southern and Eastern Europe than in the more individualist North and West, where a norm of generational independence is comparatively stronger. Thus Southern families may give more priority up generations than Northern families, and the two may respond differently to population ageing. The analyses presented here simply illustrate the between-country variation in norms and ideals in this area. The findings need to be supplemented with data from other countries and contexts, and to be explored in more depth in future analyses.

3.3 Measurements

Opinion about the proper division of responsibility between the family and the welfare state can be measured by the following question: “There are widely varying views on how we should care for people in our society. Please indicate for each of the topics mentioned whether you think (your own opinion) it is mainly the task for society, the family or for both:

- Care for older people in their home
- Care for pre-school children
- Financial support for older people who live below subsistence level
- Financial support for younger people with children who live below subsistence level

Response categories vary from (1) “totally family” to (5) “totally society”. Two items are about care and two about cash transfers, and each of the two are directed towards older people and children

respectively, leaving us the opportunity to evaluate priorities between the family and the society (taken here to mean the welfare state), between cash and care, and between children and older people.

Opinions about priorities up and down generations within the family are indicated by two parallel items as indicators of filial and parental obligations respectively: Parental obligations are being indicated by (dis-)agreement on a five-point scale:

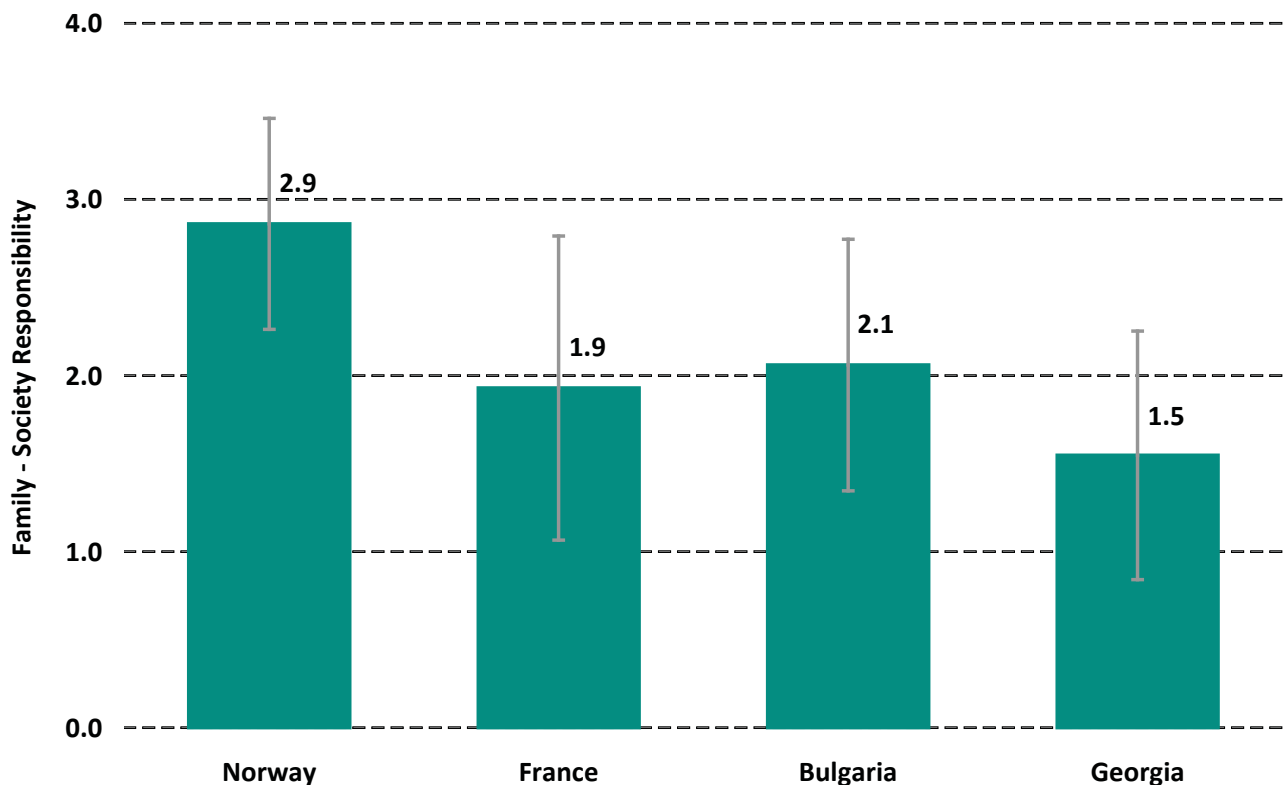
- Parents ought to provide financial help for adult children in financial difficulties.
- Parents should adjust their own lives in order to help adult children in need.

Filial obligations are indicated by quite similar, if not identical, items in the other direction:

- Children ought to provide financial help for parents with financial difficulties.
- Children should adjust their working lives to the needs of their parents.

Figure XXV

Scores on the family–societal responsibility index by country. Means (standard deviation)



Source: Notes: 0=total family responsibility, 4= total society responsibility.

3.4 Findings

Data from six countries were available for analysis: Bulgaria, France, Georgia, Germany, Norway and the Russian Federation. Figure XXV shows, as expected, that Norwegian respondents leave more of the responsibility to society than do the Bulgarians and the French, with Georgia representing the other extreme with more or less total family responsibility for care. Data were in this case only available for four countries, and are presented in Figure XXV as scores in an additive index for family-welfare state responsibility on the four items about care and transfers to elders and children, respectively.

Table 51 illustrates that cash support to meet subsistence needs, which indicates a high level of needs, is seen mainly as a societal responsibility in

all four countries: nearly totally so in Norway, but in combination with family support in the other three countries. Financial support for subsistence is more of a societal responsibility than care in all four countries.

Figure XXVI A illustrates that societal responsibility is higher for elder care than for childcare, which is mainly a family responsibility in all countries. The responsibility for elder care is mainly societal in Norway, supplemented by the family. It is mainly a family matter in Bulgaria and France, supplemented by society. Georgia stands out with care being almost totally a family responsibility. Differences within and between countries are less for financial support (Figure XXVI B).

Table 51

Percentages reporting mainly or totally societal responsibility by domain and country

| | Norway | France | Bulgaria | Georgia |
|--|--------|--------|----------|---------|
| Care for older persons in need of care at their home | 71 | 13 | 17 | 5 |
| Care for pre-school children | 27 | 11 | 6 | 1 |
| Financial support older people below subsistence level | 90 | 51 | 59 | 46 |
| Financial support younger people with children below subsistence level | 82 | 47 | 65 | 50 |

Differences in priorities up and down generations within the family are illustrated in figure XXVII A and B. Both filial and parental responsibilities are lowest in Norway and highest in Georgia. Parental obligations tend to be higher than filial obligations, except in the Russian Federation.

Finally, among older respondents (aged 67+), obligations up and down generations are balanced in Bulgaria, Georgia and the Russian Federation, while the tendency is down generations (i.e. higher parental than filial obligations) in France, Germany and Norway (figure XXVIII).

3.5 Conclusion

Responsibilities for care and financial support to the elderly and children are perceived as mainly societal, supplemented by the family in Norway. They are rather equally distributed between the family and the society in Bulgaria and France, while they are mainly to totally a family responsibility in Georgia. The observed differences are considerable, and more or less in the expected direction. Whether

they simply are responding to different opportunity structures or to differences in family cultures remains an issue to be explored in future analyses.

As for priorities, financial support is more of a societal responsibility than care in all four countries, possibly because the criteria for financial support is strict and refer to a below-subsistence level. Societal responsibility is higher for elders than for children as far as care is concerned, while societal support for subsistence gives equal priority to elders and children.

Family obligations – both filial (up generations) and parental (down generations) – are lowest in Norway and highest in Georgia, indicating a norm of autonomy between family generations in Norway, and a norm of interdependency in Georgia. Obligations between generations are balanced in Bulgaria, Georgia and the Russian Federation, while there is a priority down generations in France, Germany and Norway, supporting the developmental stake hypothesis. These are all tentative conclusions, and will be pursued in more depth in future publications.

Figure XXVI A

Per cent reporting mainly or total societal responsibility for care for older persons and pre-school children

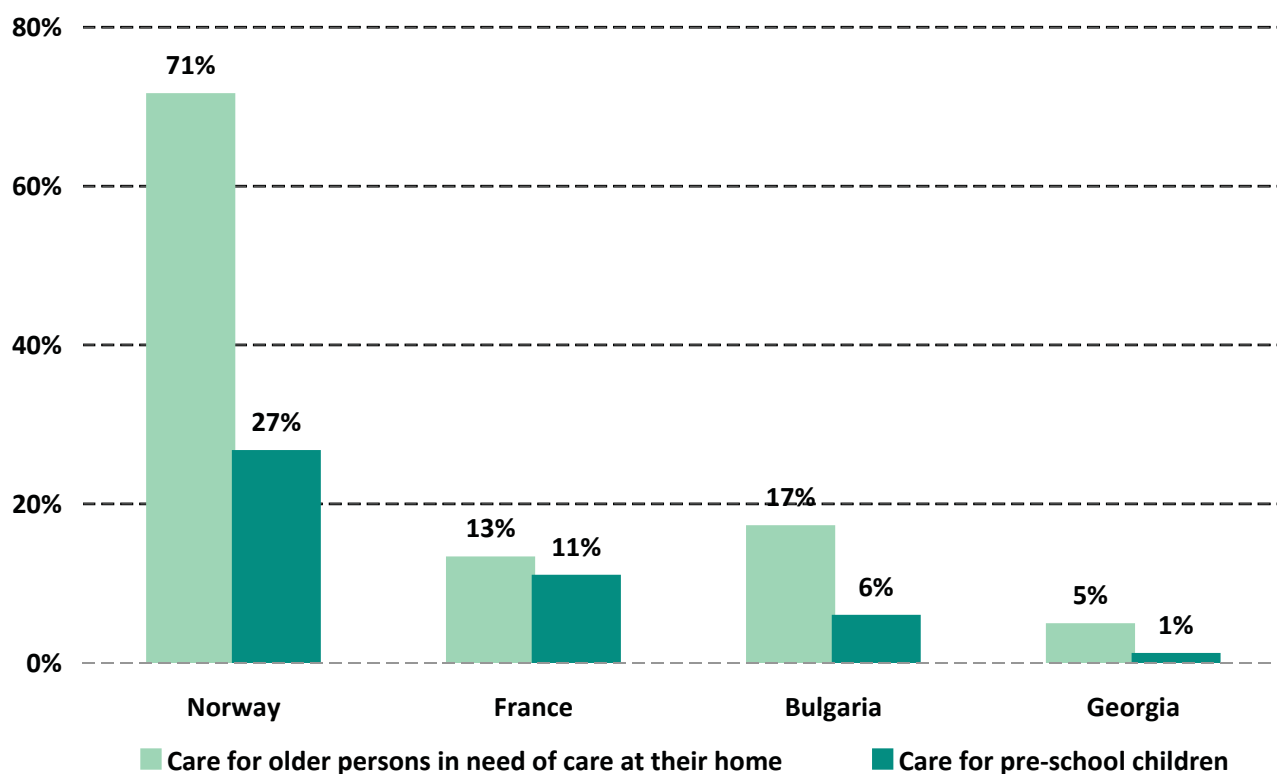


Figure XXVI B

Per cent reporting mainly or total societal responsibility for financial support to older people and younger people with children

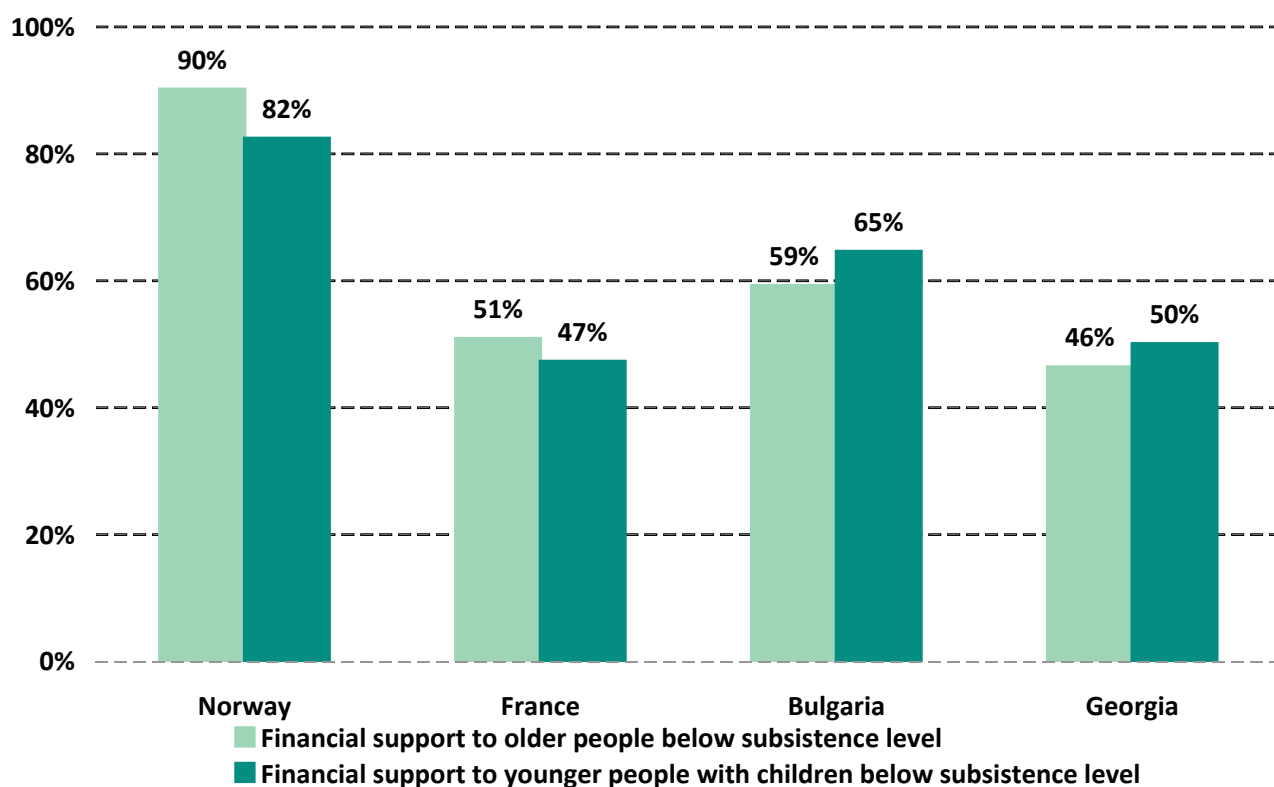


Figure XXVII A

Per cent in agreement with parental and filial obligations by country for financial support

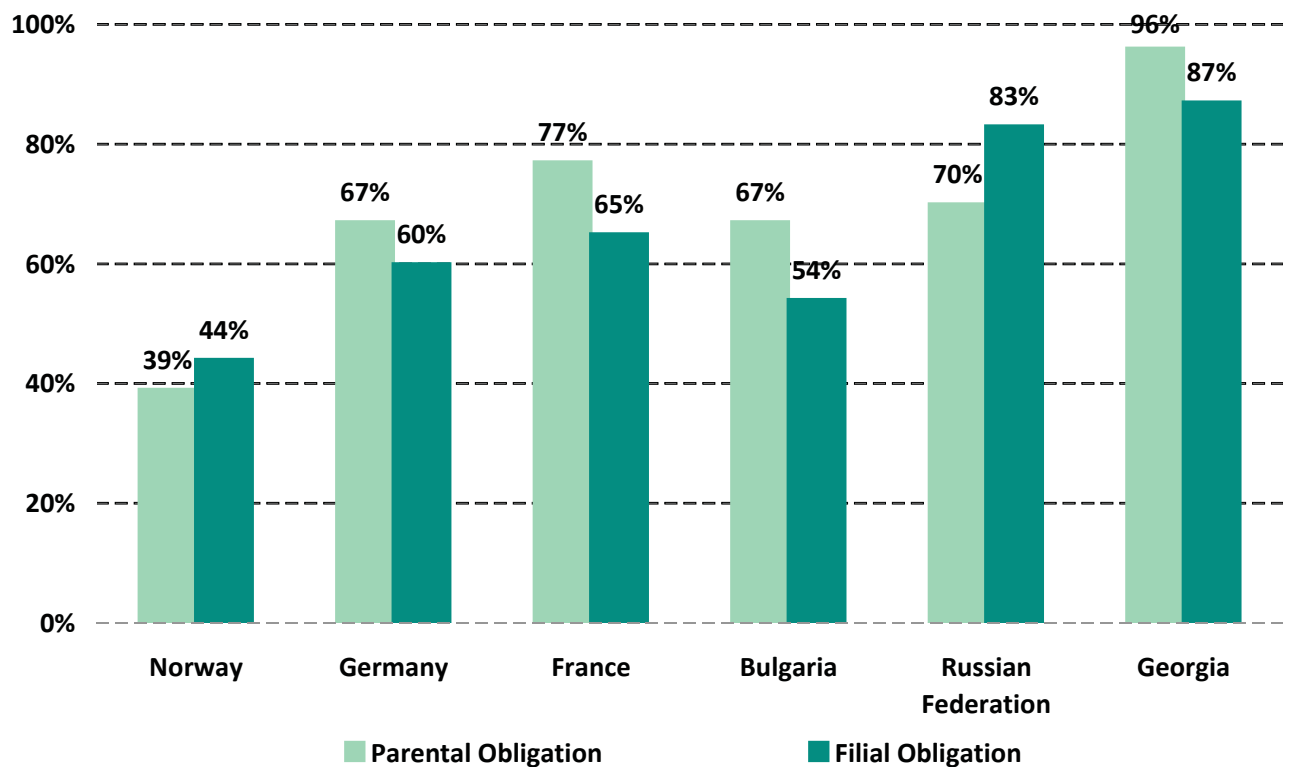


Figure XXVII B

Per cent in agreement with parental and filial obligations by country for adjustment to needs of the other.

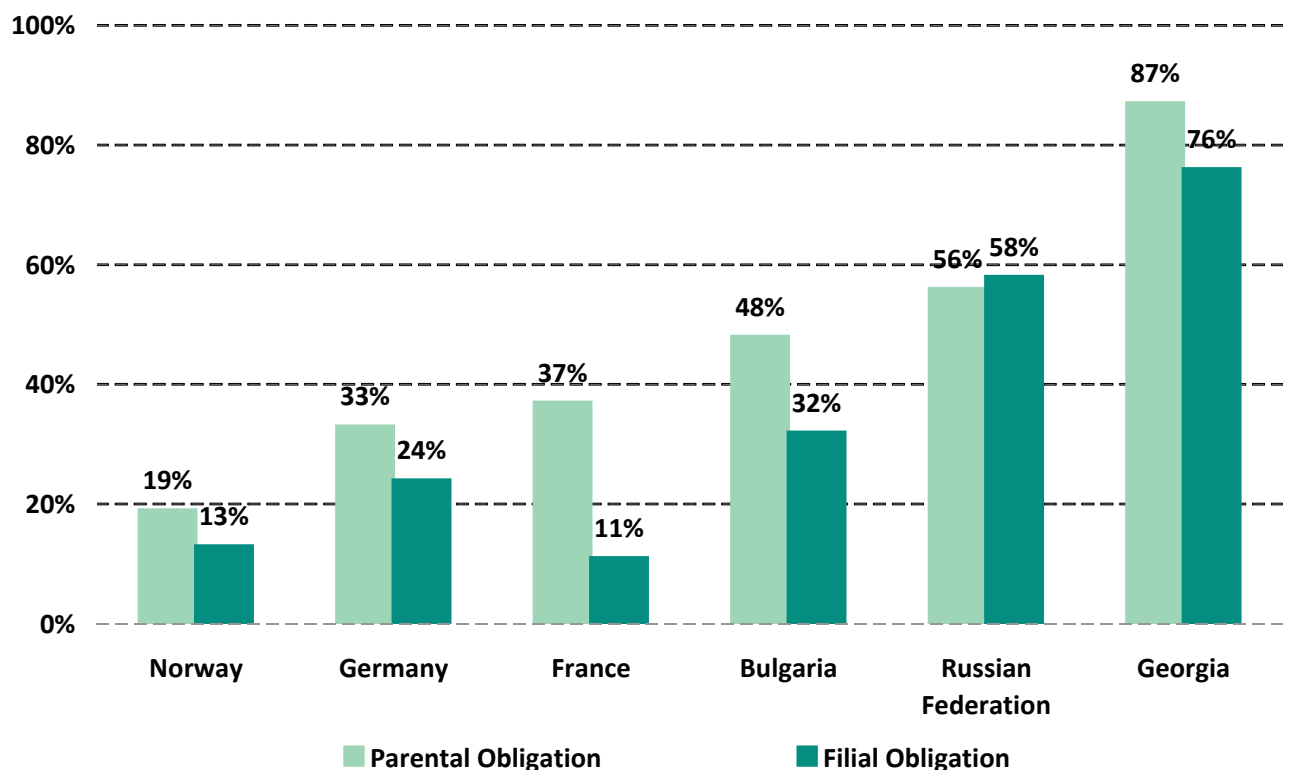
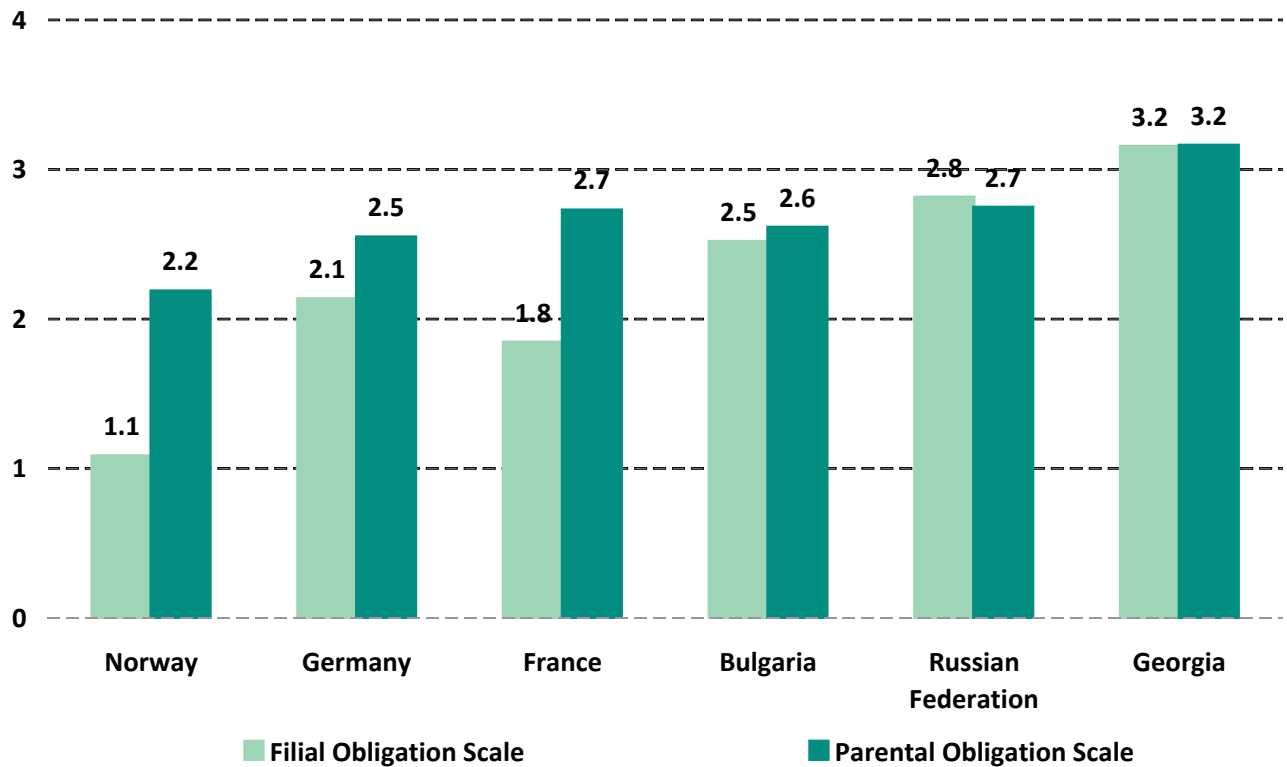


Figure XXVIII

Scores on filial and parental responsibility scales for older respondents (age 67+) by country.



Source: Scores 0 (minimum) to 4 (maximum).

4 - FUTURE PERSPECTIVES

There is still considerable controversy about the potential threat to intergenerational solidarity posed by population ageing. Some assume that the younger will become less inclined to identify with the older and will feel less obligated towards them. Others find both family and societal solidarity to be considerable and fairly resilient to change, albeit with variation in forms of expression. The preliminary analyses presented here point in this direction. Even the rather obvious assumption that the change in the population balance between older and younger age groups will drain resources among the younger need not be so obvious. Other concerns over solidarity refer to competing obligations: that it may have become more difficult to combine work and family commitments, first of all because women (daughters) have increasingly joined the (paid) labour market. Although we would acknowledge this as a potential problem, even a growing one, we would not exaggerate it. In fact, although these and other “sandwich positions” between obligations towards elders and others are rather frequent in

midlife, they are usually of a short duration and are in most cases not very intense (Künemund 2006). Besides, formal services have developed during the last 50 years in most countries, and offer in some countries alternatives to family care, and in others at least some respite and support to family carers.

Part of the picture is that the older generation should be recognized not only as a burden and a drain on resources, but as a contributor and a resource. Most research to date has focused on the younger generation – on the provision of support to older parents, and what the motives for supporting or not are. Older parents – and older generations more generally – are then explicitly or implicitly considered as passive recipients, with needs that may or may not attract support from younger generations. We know less about the parental position, including parental values, norms and preferences. Older parents are often afraid to burden their children, and may be reluctant to ask them for help, as is indeed documented also in the GGS data presented here.

Most studies, in particular in residual welfare states where the family is seen as the primary responsible for elder care, have tended to assume that older parents prefer care from their children. However, a protective attitude towards children, expressed in the form of parental reluctance to oblige them to care, was already being reported in the 1950s and 1960s, when alternatives to family care were few and of a low standard. Ethel Shanas, for example, in her previously quoted article from 1960, found that older parents were less likely than their adult children to expect that an adult daughter should take a widowed mother into her household. These findings support the intimacy-at-a-distance ideal suggested by Rosenmayr and Köckeis (1963) in the early 1960s. So also do findings by McAuley and colleagues (1985) from the United States in the 1980s: They found that older people preferred ageing in place, but they would rather have formal care than family care in order to achieve this, although some mix of formal and informal care were their favourite choice. They also found that older parents would rather move to a nursing home than move in with a child if they could no longer live independently. Women were found to be more inclined towards formal care than men, and the older to be more receptive to formal care than the younger. Parallel findings are reported by Brody et al. (1983, 1984) from the United States, and by Daatland (1990) and others (e.g. Wielink et al. 1997) from Europe.

Generally speaking, adult children tend to express a greater degree of filial obligations than what is expected from the parental side. There may, however, be a cultural contrast here, where the more tight-knitted family cultures will attract more family-oriented solutions, including shared households

between the generations. Shared households are today very uncommon in Western and Northern Europe, and far more common in the Southern and Eastern Europe. Shared households are, however, on the return globally (Sundström 1994), probably in response to opportunity more than to lack of solidarity. Generations have simply been made able to live independently, and they choose to do so when they can. Thus a shared household between generations, which used to be a characteristic of family solidarity, is no longer a general norm and no longer a general indicator of solidarity.

The main story emerging from recent studies is that older people want to remain independent as long as they possibly can. They are often reluctant to depend upon others – including their own children – not only for financial assistance, but also in daily life. What modern older parents want from children may then be contact and emotional attachment more than practical help. More traditional cultures may exhibit tighter family forms and prefer more collective solutions (cf. Reher 1998).

Solidarity stands on several legs, and is not a child of bare necessity only. Norms play a role, but so also do affection, attachment, mutual identification, and a common history – including social debt and reciprocal obligations over the life course. Some of these ties may be threatened by the demographic transition; others may possibly be strengthened by it. Thus we need to know more about the character of intergenerational solidarity and how it may be played out differently in different contexts. The Generations and Gender Study will help us in this exploration.

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