

SOCIAL POLICY, FAMILY POLICY AND INTERGENERATIONAL SOLIDARITY: A NEW DESIGN

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Summary

Over recent years, social policy has attempted to deal with the question of solidarity among different generations principally through the intervention of the State and the market. The family has been dealt with in a somewhat schizophrenic manner: on the one hand, it has been privatised and its role as a social institution has been marginalized; on the other hand, however, it has been employed as a public instrument in an attempt to remedy the failure of the State and the market. The hypothesis I would like to submit is that social policy has had a distorted effect on those very relations of solidarity it is designed to support. The present result is an increasingly harsh struggle between generations over control of the rights to public resources.

What I am suggesting is that intergenerational solidarity needs to be redefined as a 'cooperative game' involving all players within the framework of a *societal* approach to social policy: an approach entitled *complex subsidiarity* based on three cornerstones: 1) the differentiation of those social spheres dealing with the problem of intergenerational solidarity; 2) the allocation of diverse duties and resources to each sphere; 3) the regulation of relationships between the said spheres on the basis of the principle of reciprocal subsidiarity.

The main aim of this approach is the promotion of *new institutions* of 'subsidiarity through reciprocity' within each of these spheres. In this way, it becomes possible to pursue a family-friendly form of social policy, consisting in guaranteeing that all public, private and mixed (public-private) institutions face up to the problem of creating and distributing resources among generations in such a way as not to harm the family as a mediator of intergenerational solidarity.

1. *The Crisis of Solidarity Among Generations: The Issue and the Theses*

1.1. The question of the crisis of solidarity in relations between generations has become an increasingly acute social problem in recent years, one with profound long-term implications. In a growing number of countries, mention is frequently made of generational conflict (*generational clash*, *Generationenkrieg*).¹ Nevertheless, we have yet to really grasp the full meaning of this crisis and to understand what it is to be done about it.²

This question currently affects the developed world: however, given that generational conflict is intrinsic to the processes of modernisation and globalisation, the problem is bound to affect all countries in the long run, albeit in different ways and at different times.

What does the problem consist in exactly? The solidarity crisis may be initially defined as the lack of social rules, either written or unwritten, envisaged or otherwise, whereby one generation is called upon to support the others. These rules have been replaced by a conflict of interests, and the consequence of this is the increasingly strong, dramatic competition between generations for control of access to available resources.

In the past, parents helped their children grow up, and then when the children reached adulthood they in turn helped their now elderly parents through their old age. The welfare state has since intervened, providing young people with support and with equal opportunities when their parents are no longer alive or are unable to provide the necessary support themselves: likewise, it supports the elderly thus freeing the younger generations from the burden of having to do so. This external intervention has become increasingly important, and in the more advanced welfare state systems, the expectations of both the young and the elderly in terms of economic well-being now depend more on state benefits (through the tax system and a complex system of entitlements) than on support from the other generations.

¹ I am not going to justify this affirmation with lengthy quotes from recent studies, but would simply suggest that the reader look at the bibliography in question, and in particular at Malinvaud (2002), Piancastelli and Donati (2003), and Bertocchi (2004).

² I would like to cite one particular example. The European Commission Report entitled *Towards a Europe for All Ages. Promoting Prosperity and Intergenerational Solidarity* (EC Commission 1999), focuses only on the elderly and the various programmes designed to improve their living conditions, while completely ignoring the system of relations with other generations.

The emergence of the welfare state is, of course, a positive development in that it has guaranteed a greater degree of fairness in the distribution of income to the more disadvantaged sectors of the population: however, the way in which the welfare state has intervened has led to a number of distortions, of which the following are but two examples.

First distortion: the logic of pressure and agreement inherent in the welfare state has meant that in many countries, the redistribution of wealth among generations performed by the State tends to favour the elderly, to the detriment of children and the younger generations. The resources that ought to be accumulated for future generations are being spent on today's elderly, and there is a growing awareness that today's youth, as they become adults and subsequently elderly themselves, will have fewer available welfare resources compared with previous generations.

Second distortion: the 'middle' generation (today's adults) are subjected to increasing social pressure, forced as they are to take care of both their young children, their elderly parents, and – given the gradual increase in life expectancy – of their grandparents as well. Therefore these intermediate generations are said to be 'squeezed', as the welfare state burdens the families of adult parents with the entire cost of its social policies.

Moreover, whereas the welfare state is considered the guarantor of intergenerational solidarity from the point of view of legislative expectation, in practice the welfare state's action is limited (as proven by the persistence of poverty) and has become increasingly critical in terms of economic feasibility. In any case, the welfare state has not replaced the intergenerational transfers that occur within the family-parent system. Private transfers continue, and are of considerable importance even in the more developed welfare state systems (Kohli, 1999).

The question that has to be asked is: should the welfare state continue with, and eventually increase, its intervention in the regulation of exchanges between generations, or should another approach be adopted?

1.2. There are various potential solutions to the above-mentioned problem. An initial solution lies in the reform of the welfare state itself, designed to make it better suited to achieving equal opportunities both within each generation and among the various different generations. This approach is based on the belief that solidarity can only be achieved if priority is given to the use of political power over all other means (I am going to call this the *lab* approach). A second solution is based on the belief that the crisis of the welfare state is irreversible, and as such a market-based approach needs to

be adopted, whereby each generation is called upon to worry about its own future (I shall call this the *lib* approach). A third solution, on the other hand, is based on the belief that solidarity among different generations is a complex question of rules of exchange between the diverse levels of society (the State, the market, the third sector and families), and as such it proposes to redesign social policies on the basis of the subsidiarity principle (I shall call this the *subsidiarity* approach).

1.3. In the present paper I wish to take a closer look at the underlying reasons for choosing this third option. In order to do so, I shall start by observing that currently existing models of social policy are generally characterised by one of two opposing approaches: the first approach entrusts the problems of intergenerational solidarity to the mechanisms of the free market; the second approach deals with such problems through the use of the State's political power, with policy consisting of prescriptive programmes. In both cases, the outcome has been unsatisfactory, negative, and in some cases, even contorted. Moreover, proposals of a mix of the free market and State regulation (*lib/lab*) fail to remedy this situation.

My hypothesis here is that it is possible to find alternative solutions provided we conceive of social policy within the framework of a partnership-type conception of welfare institutions, based on the principle of subsidiarity, that manages to valorise the agency of the social subjectivity of the family and the network of associations surrounding the family, through a complex series of citizenship's rights-duties granted to the family and to those civil associations that promote intergenerational solidarity.

This hypothesis is based on the following points:

(i) *Each social policy requires a suitable definition of the term 'generation'.* Social policies tend to contain different understandings of exactly what 'generations' consist in. The majority of present-day social policies employ an abstract, impersonal concept of generation, one that is no more than a simple statistical aggregate of individuals, and this leads to the obliteration of generational *relations*. Generations are thus reduced to mere entities of production and consumption. It should be pointed out that the ideas the State and the market have of generations are only of use for certain operations within the field of political economics (such as those concerning the distribution of certain types of resources), but not for formulating social policies designed to encourage solidarity among generations. In order to achieve such solidarity,

social policies need to contain a definition of the term 'generation' that explicates and valorises the relational nature of solidarity (section 2);

(ii) *We need to go beyond the existing, obsolete models of welfare.* Traditional social policy models are quickly becoming obsolete. The three most common ideal-type models (which I shall call, respectively, the *lib* model, the *paternalistic or vertical subsidiarity state* model, and the *lab* model) all have serious limitations. Their evolution tends to lead towards a scenario characterised by what, for the sake of brevity, I shall call '*lib/lab* solutions', i.e. a mix of State intervention and the free-market approach. An analysis of these solutions leads us to think that they themselves are incapable of meeting the considerable challenges to intergenerational solidarity the future holds. Thus I am going to counter this scenario with an alternative one: one characterised by *societal or complex subsidiarity*. Such solutions are new in that they are based upon relational policies (see Donati, 2003a), and they are slowly emerging in experimental forms in a number of different countries. A comparison of the two approaches (*lib/lab* on the one hand and *subsidiarity* on the other) will help to clarify their differences (section 3);

(iii) *A complex notion of intergenerational solidarity that takes account of the role of the family.* I also believe that the failure of social policy is due, first and foremost, to the way in which social policy actors have conceived the roles played by the family and family-based associations. Traditional social policies have acted upon primary and associative networks in ways that have weakened and 'eroded' the family as society's primary form of social capital. If we wish to regenerate the fabric of solidarity among generations, we need to ensure that social policy be based upon a complex notion of solidarity corresponding to certain specific dimensions, criteria and institutions.

To put it briefly, intergenerational solidarity is based on the synergy between four different, fundamentally important spheres, together with their respective criteria of social justice: the State (solidarity in the form of the redistribution of wealth: redistributive justice); the market (solidarity in the form of equal opportunities: commutative equity); the family (primary solidarity in the form of acknowledgment: justice as sharing); the world of civil associations (secondary solidarity as a principle of reciprocity among generations as adopted by private social associations and non-profit organisations: justice as mutual aid and extended reciprocity) (section 4).

In the concluding section, I shall try to illustrate some concrete proposals concerning the nature of those institutions, based on solidarity and subsidiarity, that could be set up in order to deal with the growing lack of intergenerational solidarity in those areas characterised by the failure of both the State and the market (section 5).

2. Which Generations and What Kind of Solidarity Are We Talking About Here? Certain Common Misunderstandings

2.1. Why has intergenerational solidarity become a problem, and why, in particular, has it become a problem within the social policy field?

There are a number of empirical reasons for the above, and various explanations have been furnished for the decline in intergenerational relations. On the one hand, the causes are to be found in the processes of modernisation and globalisation that weaken social ties and empty them of their intrinsic value; on the other hand, they consist in the fact that the welfare state itself has made generations increasingly anonymous, fragmented and impersonal, since it has reinforced (rather than countered) the commercialisation of the market.

Intergenerational solidarity became a problem the moment society stopped seeing generations as historical, social and cultural entities, and began perceiving them simply as statistical aggregates to be used in order to calculate private consumption and welfare expenditure. Imbalances, separations and conflicts between generations have been a constant of modernity: nevertheless, the present crisis arose at the peak of expansion of the welfare state (from the 1980s onwards), at the same time as the so-called second demographic transition characterising western countries (Donati, 1991).

The concept of generation has gradually come to mean something of a rather generic nature. International debate increasingly focuses on what it sees as the equality of generations, but both terms (equality and generations) are becoming increasingly vague (Barry, 2000; Donati, 2002).

The idea of 'leaving a better world for future generations' ('tomorrow's humanity') is of course a valid and essentially important one: however, when 'generation' is conceived of in terms of a general population living on Earth at Time T1 and at Time T2, this could annul the meaning of what it is that gives rise to the generations.³ In fact, our problem concerns generations per-

³ See the *UN Declaration on the responsibilities of the present generations towards future generations* (Unesco, Paris, 12 November 1997). This declaration perceives gener-

ceived as groups with blood ties, linked by a series of concrete relationships involving short, medium and long-term responsibilities. The replacing of such relations with a vague concept of solidarity between present and future humanity is an abstract operation. Generations either constitute a relational concept (they consist of persons tied by relationships of descent) or they do not exist at all. Social policy, however, fails to grasp this relational quality, and in fact tends to limit such relations to that between parents and their under-age children within the framework of the limited, privatised family sphere.

The fact remains that the concepts of generation and intergenerational solidarity are expressed in purely physical and economical terms. Society itself is thus reduced to an abstract collection of individuals who are not linked by any real social relations, but only by the commonly-shared problem of economic and physical survival.

If we wish to construe a social policy of intergenerational solidarity, then we need to start by deciding which definition of generation is to be used within the social policy sphere.

2.2. The word 'generation' can be defined in at least four very different ways (Donati, 1997):

- in the *statistical* sense of the word, a generation is seen as a *demographic cohort* of those individuals born in the same year or within a certain statistical interval of n years;
 - in the *historical* sense of the word, a generation is an *age group* which although it may coincide with a demographic cohort, is perceived as a social group due to the fact that its members are united by a certain historical experience or by a given lifestyle;
- among specialists, a commonly-held perception of generation is the one derived from the writings of K. Mannheim: it is seen in the *socio-political and socio-cultural* sense as a 'generational unit' defined as an age sub-group producing and leading social and cultural movements in that it shares a common ideological identity; this definition is widely used in the sociological field, and it tends to associate a given generation with a given ideological movement, as a result of which the term 'generation' loses its blood-tie associations;

ations as anonymous, impersonal, soulless masses. Instead of generation we could use the term 'posterity', 'the inhabitants of the Earth in 50, 100 or 200 years' time', or some other such term. Such an abstract, indeterminate concept of generation is of no use in the social policy field.

– in the *sociological* sense of the word, a generation is a *social entity* corresponding to that group of individuals who share a given position with regard to family ties, that is, in accordance with biological and cultural inheritance, those relations that are socially mediated by the family and relatives.

Generally speaking, social policy has made use of, and continues to make use of, the first of the above four definitions, that is, the statistical definition of the demographic cohort. Thus the historical, social and cultural aspects of what a generation means in relation to other generations have been effectively removed. The perception of society as a morphogenetic process deriving from relations between different generations has been all but lost. Social policies have ended up perceiving society as an aggregate of individuals struggling against each other, rather than a fabric of relationships, albeit to a certain extent ambivalent and conflictual, in need of solidarity.

2.3. It is easy to see that social policy models vary according to the definition of generation that one adopts. Briefly speaking, there are three major models dealing with the question of intergenerational solidarity (summarised in fig. 1).

I. *The First Model is that of Sustainability*

Solidarity between one generation and the next is hereby understood to consist in the fact that one generation ought not to harm the opportunities the subsequent generations are going to have to make use of the available resources. The concept of generation employed here is that of a given, living population at any one moment in time. This model invokes solidarity among generations as a general bioethical criterion valid for any actor (Dobson, 2000). However, social policies refer in particular to market players and State functionaries. Strategy is based on criteria of economic utility and legislative sanction. Incentives are offered to those who successfully adopt such criteria, while those who fail to do so are penalised.

It is clearly vitally important to acknowledge the importance of solidarity among generations as a criterion of public ethics, one that establishes a form of social responsibility towards future generations. It educates people in the art of 'ethical consumption'. Nevertheless, while this model can be applied with relative ease when natural resources (first and foremost the natural environment) are at stake, it is much more difficult to employ in the social policy field. The reason for this is that social policy resources do not constitute a stock comparable to that of natural resources.

II. *The Second Model is that of Welfare Entitlements*

Intergenerational solidarity is conceived as equal opportunity of access to those welfare rights granted to each demographic cohort by the political-administrative system. The concept of generation employed here is simply a demographic-statistical variety (young people, adults, the elderly). Solidarity among different generations is basically seen as a political problem of a distributive nature, perceived in statistical terms. It pertains to government policies in the strict sense of the word, and as such is a rather limited concept.

III. *The Third Model I Shall Call the Relational Model*

Intergenerational solidarity is defined as a complex of rules which define the relational rights and duties pertaining to people who have in common similar relations of family descent (i.e. belonging to groups, and the relations between such groups, characterised by given blood ties). The concept of generation is a sociological one: it refers to an age group in that the individual members have similar family relations (giving birth to, given birth by) mediated by society (that is, they are seen as children, parents, grandparents, great-grandparents etc.). This model covers all actors, both public and private, although it is particularly keyed to those from civil society. In this

THREE MODELS OF INTERGENERATIONAL SOLIDARITY AND EQUITY		
MODELS of social policy	Definition of intergenerational solidarity/equity	Concept of generation
(I) the <i>sustainability</i> model	Equal opportunity of access to natural and environmental goods and to the collective resources of social welfare	The population in general or a part thereof
(II) the <i>entitlements</i> model	Equal opportunity of access to social welfare rights	Generation conceived of as a statistical cohort (those individuals born within a given time interval: children-young people-adults-the elderly).
(III) the <i>relational</i> model	The relational rights and duties of certain groups connected by descent and <i>between</i> these groups (on the basis of the principle of reciprocity)	Age groups that have in common similar relations of family descent (giving birth to/given birth by) mediated by the society (children-parents-grandparents-great-grandparents)

Fig. 1. Source: Donati, 2002.

case, solidarity among different generations is defined in more generalised terms than in previous cases, as it regards all types of good (i.e. not only natural resources and citizenship entitlements, but also the human and social capital associated with the transmission of a given cultural heritage).

Thus the way we define policies of intergenerational solidarity depends largely on our understanding of the term generation, of the relations between generations, and of the most appropriate ways of dealing with these relations.

3. The Ways Social Policy Deals with the Problem of Intergenerational Solidarity: Old and New Models

3.1. For over a century, 'social policy' was synonymous with welfare state. It was believed that solidarity between the generations was written in the social pact upon which the welfare state, perceived as the 'public family', was founded. The distribution of public resources involved the application of criteria similar to those perceived to have been adopted by a nation's families. Today this pact is being challenged both in the public sphere and in the everyday lives of families.

What lies behind this change in society? It would seem that we are witnessing an historical process whereby the collectivising impulse that modern society has searched through the Nation-State has significantly diminished. The collectivising impulse of the past has been replaced by the mechanisms of the free market, which is now only required to observe a limited number of criteria of equity with regard to which the State reserves the right to intervene (equal opportunities, principles of sexual, racial and religious non-discrimination, etc.).

The withering away of traditional forms of solidarity has led to the emergence of a rather worrying historical scenario. What exactly lies behind such transformations? An inexorable decline in solidarity between generations, or, on the contrary, the opportunity for new forms of solidarity to emerge?

It would not be exactly correct to say that there emerges a paucity of solidarity in all fields: what we are witness to, rather, is a process of differentiation, whereby solidarity diminishes in certain areas but increases in others. New rules of play are emerging in each area of action. The point is that in many social policy sectors, the concept of generation is usually presented as a vague criterion employed in the definition of the strategies and concrete measures to be adopted.

3.2. The standard social policy of welfare systems linked to the entitlements and sustainability models, takes age as a distributive criterion, but does not possess a cultural framework whereby individuals of different ages are linked in a relational manner. Generations are thus perceived as competing groups of individuals.

The underlying reason for this situation, I believe, consists in the fact that social policies, even when directly or indirectly concerned with intergenerational solidarity, tend to be based on the idea that society is fundamentally no more than a stage for economic and political competition for the available resources. The relational model offers something more than this: let us now try to understand how relational policies can be perceived without having to rely on the above-mentioned existing models.

3.3. Let us consider the ideal-type models of social policy that have until now tried to guarantee intergenerational solidarity. I am going to analyse their differences and, above all, their limits (with regard to the individual characteristics of such models, see fig. 2).⁴ Unlike other writers,⁵ I am going to distinguish between three different models.

(1) *Liberal Systems*

Such systems leave solidarity between generations to the private sphere, and only intervene in cases of extreme necessity after the event (*liberal* policies). They have low levels of social cost and of regulation of generational relations.

⁴ I propose to use ideal-types similar to those normally used in debates on welfare capitalism. The reason I call these types 'ideal-types' is that empirical types, as Arts and Gelissen have recently observed (2002), are rather complex hybrids. As it is well-known, Esping-Andersen (1990) distinguishes between three worlds of welfare capitalism (liberal, conservative-corporatist, social-democratic), to which he adds a fourth ('Mediterranean model') characterized by the fact of being a more 'family-based' form. But this typology remains rather problematic, and ultimately prove distorting or useless. For the sake of simplicity, I therefore believe it is a good idea to employ only an ideal-typical typology, since empirical types prove difficult to classify.

⁵ In the USA, some scholars believe that two principal trends can be distinguished: on the one hand, there are those supporters of 'generational equity' as the duty and responsibility of the private sphere (the *conservatives*), and on the other, there are those who believe in the need for the State to promote interdependence between generations (the *liberals*) (Williamson, MacNamara and Howling, 2003).

The basic principle that governs *the civil rights of intergenerational solidarity is that of private property* and of the institution connected to this, that is, the family defined in contractual terms (this is the framework within which the concept of 'generational equity' is placed according to Williamson, MacNamara and Howling, 2003).

The strategies and concrete measures adopted mainly focus on private insurance (health, social security and personal social services): the State is perceived as playing a secondary role, while the third sector is seen as playing a purely charitable role (compassionate capitalism).

The distorted effects of this approach, this ideology of capitalist individualism, can be seen in the fragmentation of the social fabric, in a high degree of illegitimate inequality and of injustice in the distribution of wealth. Intergenerational relations are individualised by legislation and are characterised by a *natural drift*.

(2) *Traditional Corporative Systems*

This type of regime links the welfare treatment of different generations to the positions held by individuals in the labour market, on the one hand, and within the family on the other. State measures are mainly addressed to the provision of income maintenance benefits related to occupational status. This means that the sphere of solidarity remains quite narrow and corporatist. These regimes are dominant in Continental European countries – such as France, Germany and, to a certain degree, Italy.

Within such systems, the generational problem is defined by the fact that the two large categories in question, namely *children* and *the elderly*, lie outside of the sphere of the employment contract,⁶ and thus depend upon the family and/or the State. As a result, the problem of solidarity between different generations is seen as a trade off – not always of the cooperative variety, but often of a conflictual variety – between the family and the State. Subsidiarity is mainly of the vertical variety. In some cases, such as that of Italy, subsidiarity maybe reversed, and it is the family that subsidises the State, rather than vice-versa.

The structural weakness of this model lies in the fact that, unlike the *lib* and *lab* models, such systems design the welfare system on the basis of the 'model' family (standard or regular according to the socio-cultural standards

⁶ With regard to wages as a link between monetary flows and welfare: see Maier and Harvey (2003).

of the time). When such a model loses its leading position either in real terms or in terms of public support (as is the case of the one-breadwinner family based on a stable couple and a given number of children), then certain problems arise, and social policy has to be redesigned as a result.

(3) *Lab Systems*

These systems distribute welfare benefits as individual citizenship entitlements to the various age categories, accompanied by certain controls and obligations aimed at guaranteeing higher levels of social equality (*lab* policies). They are characterised by a high social cost and a considerable degree of regulation of intergenerational relations.

In this way, intergenerational solidarity is basically treated as a political question: the State is obliged to intervene beforehand in all ordinary situations, rather than just after the event when situations of poverty arise.

The strategies and concrete measures adopted are based on what Esping-Andersen (2002) calls the *decommodification* of everyday needs and services. However, this term remains rather ambiguous given that the same author proposes that welfare benefits granted to families be taxed (Esping-Andersen, 2002, p. 17).

This model is based on the intrinsic, structural mistrust in the capacity of the family to perform an equitable, independent function (Anderberg and Balestrino, 2003). The result of this is that such systems tend to reduce, rather than increase, the *empowerment* of the family.

The distortive effects are reflected in the fact that intergenerational relations fluctuate as a result of their regulation, in a similar way to those in the *lib* model; the difference between the two models being that in the case of the *lib* model, this fluctuation is driven by market forces, whereas in the *lab* model, it is induced by state regulation.

The three models described in the following page are all going through a critical period for a variety of different reasons: however, in my view the key issue here is that all of them (fig. 2) accept that the problem of solidarity between generations has to be perceived as a public issue rather than just a private one. Nevertheless, the 'public' rules that have been adopted vary from one case to the next. Since in the case of each of the three models, the choice of the main criterion tends to exclude all others, each model is in itself of a critical nature. The so-called '*conservative*' policies (this is what they are called in the USA, whereas in Europe they are named '*liberal*') tend to privatise intergenerational solidarity duties, whereas the *liberal* (in Europe, named '*social-democratic*') policies tend to defend the welfare

IDEAL-TYPE MODELS OF WELFARE POLICIES SUPPORTING INTERGENERATIONAL SOLIDARITY			
Type of system: Category of analysis	(1) Compassionate capitalist systems (lib) <i>(market-driven social policies)</i>	(2) Corporative-style systems <i>(occupational category-driven social policies)</i>	(3) Social-democratic systems (lab) <i>(state-driven social policies)</i>
<i>Example countries</i>	USA (and many English-speaking countries in general)	Continental European Countries (mainly Germany and Italy, partially France)	Scandinavian and similar countries
<i>Role of the State</i>	Minimal (in order to maximise private freedom)	Considerable (in order to guarantee the collective protection of the various social categories)	Maximum (in order to maximise social equality)
<i>Public spending (and the respective fiscal pressure)</i>	As low as possible (in order to encourage private insurance schemes)	High (in order to maintain levels of redistribution of wealth high)	As high as possible (in order to maximise public redistribution of wealth)
<i>Objectives</i>	Leave intergenerational solidarity to direct exchanges within the family and among relatives and to market mechanisms (in order to keep public intervention to a minimum)	Social welfare treatment for all and the guaranteed protection of those social categories (of workers) capable of making a contribution	The statutory redistribution of wealth in favour of the less fortunate age groups by means of political power (the direct and indirect transfer to the less fortunate age groups and to the more marginalized areas of life)
<i>Concrete measures (rights to resources)</i>	– Freedom as the choice of the owner or consumer – Eliminate taxation from exchanges within the family circle – Assistance limited to the poor (those below the poverty line) who merit it	– Conditional, selective freedom of access to benefits – Strong contributory system – Control of the poverty thresholds (above and below)	– Control over inequalities by means of vertical redistribution – Universal, uniform treatment – Taxation of exchanges within the family circle – Taxation of family benefits if necessary
<i>Basic principle governing intergenerational solidarity</i>	Private property-based rights	Social (occupational) category-based rights	Individual citizenship-based rights
<i>The understanding and implementation of the principle of subsidiarity</i>	Subsidiarity as a residual intervention (as a form of <i>ex post</i> help in extreme cases of need)	Subsidiarity as a stratified and organic principle of conservative social cohesion	Subsidiarity as a safety net for the entire length of a person's life (welfarism)

Fig. 2.

state. Both approaches appear increasingly incapable of dealing with the public issue of intergenerational solidarity, as they both fail to evaluate their effects on the family life-worlds. The traditional, corporative-style model, which is the one that is most aware of its repercussions on family relations, and thus the one most prepared to regulate intergenerational solidarity by means of the family, finds itself in difficulty when faced with the principle of equal opportunities (between the sexes and among generations). In fact, since it is based on the principles of the recognition and valorisation of social ties (its reference unit is the family group-institution, also in statistical terms), it has problems in achieving equity when the latter is seen as equal to individual opportunities.

3.4. Those models inherited from the past are affected by deep-rooted changes as a result both of their internal deficiencies, and of the external pressures they are subjected to (globalisation). The alternatives seem to point in two directions. On the one hand, they tend towards a mixture of various different criteria, and in general towards welfare systems of the reformist variety (for which reason I refer to them as *lib/lab*). On the other hand, since such mixed approaches are also blighted by continual failure, social policy needs to be thoroughly redesigned. Hence the decisive role to be played by the alternatives I call 'configurations of complex subsidiarity'. Let us now take a brief look at both of the said scenarios (fig. 3).

(I) *The Reformist Scenarios (Lib/Lab Mix Proposals)*

Such scenarios, combining both *lib* and *lab* approaches, result in the so-called *welfare mix*. The corporate model policies, envisaging support for intergenerational solidarity in the form of separate economic treatment for different social categories, are all but abandoned. In any case, the idea of intergenerational solidarity based on the family as a whole is abandoned, as are the concepts of *basic family income* and *family wage* (Montanari, 2000). The tax system no longer envisages taxation designed to support intergenerational solidarity through the institution of the family, since its objective is now that of taxing individuals and their lifetime opportunities (for a review of European tax systems, see: Dingeldey, 2001). Therefore, this approach carefully avoids any definition of the family, apart from when safeguarding relations between parents and children (the matrimonial bond is privatised, while the individual tie between an individual parent and his/her child is subjected to increasing obligations). The world of rights

(and by implication, that of the family and of generational relations) is basically an individualistic one (see the EU's *Charter of Fundamental Rights*, which does not safeguard the family as a social institution, but only as an individual right) (I have written extensively on this question elsewhere).

The strategies adopted are based on the principles of privatisation and decentralisation mixed together with elements of community care. Concrete measures are seen as an attempt to establish more widely integrated and socially controlled systems of benefits and services (Bahle, 2003).

The major distortive effects are: firstly, the battle among the generations over entitlement to resources in a markedly antagonistic context; secondly, the fact that policies of inclusion lead to further exclusions. It should be said that these effects are largely due to the fact that treatment of the various generations is no longer based on social status, but rather on a criterion of a contractual nature (Handler, 2003).

Those who talk of subsidiarity within this framework see it essentially as an instrument of reform within the context of the State/market complex. Civil society may be involved, not as an autonomous subject, but rather as a subject delegated to perform certain functions of a political-administrative nature.

If we focus, as Maier and Harvey (2003, p. 19) have done, on the methods of obtaining resources, on the ways of distributing benefits and on the links between the two, the *lib/lab* idea is that of countering the diverse forms of 'socialisation' of social resources called for by the *lab* models (in particular, through taxation of individuals and families), and of seeing how these resources can be utilised and can change over time. For example, the statutory monetary transfers from one generation of employees to another generation of former employees can be achieved by means of both income tax systems and of social welfare funds involving both employers and employees. Both forms of socialisation imply the transfer of purchasing power from the group that is subjected to the withdrawal to the social groups that benefit from it and thus are able to purchase goods. Maier and Harvey point out that this is not just an act of decommmodification, or of socialisation whereby resources are subtracted from the market economy. On the contrary, it involves the creation of societally instituted forms of resource flows to which a great variety of different rights exist.

This model constitutes, above all, a critique of the excessive socialisation inherent in the lab approach, and as such represents a social-democratic model integrated with elements of liberalism.

(II) *The 'Complex Subsidiarity' Scenarios*

Such scenarios are characterised by the abandonment of the lib/lab philosophy as the underlying principle of social policy. This lib/lab compromise is replaced by a complex subsidiarity principle (both vertical and horizontal, circular and mixed).

The 'subsidiarity through reciprocity' approach is recognisable from the fact that it creates new associative institutions designed to tackle the everyday problem of intergenerational solidarity. This is not welfarism, since the objective here is that of empowering those social spheres that mediate between one generation and the next. Such spheres involve, at one and the same time, the production, distribution and consumption of those goods and services that are normally considered to be the object of social policy (welfare goods). A particularly important role is played by *relational goods and services*. These forms of subsidiarity can be said to constitute a 'societal model' in that they are designed to produce societal organisations in which intergenerational solidarity is considered their prime objective (Donati, 2003a). This model can be found in geopolitical settings where support is given to mutual aid, cooperation and social benefit investment among generations through programmes managed by *ad hoc* non-governmental, non-profit organisations.

The societal model's strategies and concrete measures focus on the creation of ad hoc institutions that in general are *non-profit* and *multi-stakeholder* (when the major stakeholders are the generations themselves). The key aims are: to render those social powers, that are responsible for the management of intergenerational resource flows, accountable for their actions; to help families operate towards establishing solidarity among generations (support and promotion of the family as a social subject of redistribution), as well as those associations dealing with intergenerational problems.

Subsidiarity is changing radically: what Maier and Harvey call 'socially instituted forms of resource flows' are today configured as new forms of socialisation created by the third sector, possibly in collaboration with organizations belonging to other sectors. The question is: who are these actors? They stem from civil society, and include examples such as: the ethical banks, specific community foundations supporting intergenerational solidarity, organizations of mutual aid, social cooperatives and social enterprises (in Italian 'imprese sociali') run for those families that on their own are not capable of dealing with problems of reciprocal aid in various areas of daily life. In these cases, what we are witness to is a process of *decom-*

TWO ALTERNATIVE SCENARIOS OF WELFARE POLICIES		
SUPPORTING INTERGENERATIONAL SOLIDARITY		
Type of scenario: Category of analysis:	(I) Reformist scenarios <i>(complex market ↔ state-driven social policies)</i> (lib/lab mix)	(II) Scenarios of 'complex subsidiarity through reciprocity' (societal model)
<i>Example countries</i>	Generally speaking, the so-called 'European social model'	Emerging experiments in certain countries or regions (on a limited scale)
<i>Role of the State</i>	Regulator of an optimum balance between equal opportunities and individual freedom	Relational guide (governance) of intermediary social formations in their reciprocal solidarity
<i>Public spending (and the respective fiscal pressure)</i>	Rationalise public spending using criteria of selectivity and set targets	Qualify public spending according to the solidarity it produces within the various social spheres
<i>Objectives</i>	Compulsory individualism (governing equal opportunities in the market and in generalized exchanges)	Render those social powers, that are responsible for the management of intergenerational resource flows, accountable for their actions (and in particular, help families to contribute towards intergenerational solidarity)
<i>Concrete measures (rights to resources)</i>	<ul style="list-style-type: none"> - Enforcement of individual equal opportunities - Selective benefits - Primarily vertical, partially horizontal redistribution measures - Active fight against the poverty of women and children 	<ul style="list-style-type: none"> - 'Third-party' societal institutions (neither state-run nor private) governed according to the principle of intergenerational reciprocity - Non profit enterprises in which the stakeholders are the generations themselves - Forms of mutual aid among families for several (more than 3) generations
<i>Basic principle governing intergenerational solidarity</i>	<i>Minimum safety net for all</i> + <i>Employment-based rights</i>	<i>Minimum safety net for all</i> + <i>Rights based on associational memberships</i>
<i>The understanding and implementation of the principle of subsidiarity</i>	Subsidiarity as an employment incentive (workfare and associated benefits)	Subsidiarity as a relationship of reciprocal valorisation (societal governance of intergenerational exchange relations, e.g. family insurances schemes)

Fig. 3.

modification, not through political channels but through *civil ones*. This is the model of those systems that I have chosen to call subsidiary in a new and complex way.

The alternative, represented by those societal systems based on complex subsidiarity, does not replace either the State or the free market, but prevents these actors from going beyond their own specific functions. Such a model must perform the following operations:

(i) it must formulate differentiated spheres, that is, it must distinguish between the intergenerational exchange criteria adopted in the various different social spheres (in the family-relatives sphere, in the State, in the market, in civil society's associative sphere).⁷

(ii) it must develop *ad hoc* institutions when solidarity comes into play. Since intergenerational solidarity is only dealt with in a partial, reductive manner by the State and by the market, and since the family is an increasingly weak institution, it must develop new institutions of 'subsidiarity through reciprocity' capable of dealing with intergenerational solidarity as primary and secondary social capital within the sphere of civil society (Donati, 2003b).

(iii) it must link the various spheres to each other, and in particular it must enable institutions of civil solidarity to influence the State and the market, putting the terms of relations of reciprocal subsidiarity to them (Willke, 2003).

My argument is that the defects in the *lib*, *lab* and *lib/lab* models derive from the fact that these models fail to base solidarity on a complex principle of subsidiarity, and therefore solidarity becomes mere welfarism and workfare disguised as concern for social cohesion.

The complex subsidiarity model (fig. 3, column II) is seen by many scholars simply as a corrective to the other models. However, in my view it underlies a societal structure which, from many points of view, is radically different. It perceives employment contracts, property, welfare systems (pensions, health care, welfare care) very differently: they are no longer seen as a compromise between public and private interests, but as an expression of identity and independence whose legitimisation lies in the well-being of the community. It sees the welfare rights of generations as relational rather than individualistic (Wolgast, 1987): and as regards citi-

⁷ I am referring here to the architecture of subsidiarity developed by Den-Hartogh (1999) from M. Walzer's theory of justice.

zanship rights, the rights of individuals are accompanied by the citizenship rights of intermediate social structures such as the family and those associations operating in favour of intergenerational solidarity.

In other words, the question of intergenerational solidarity is no longer reduced to a question of expenditure (as proposed in the past by many scholars),⁸ but is perceived as a form of relationship based on sharing. The principle of subsidiarity means that the share granted to each generation does not depend on the generosity of politicians or the efficiency of market mechanisms, but on the institution of rules of exchange that encourage something *more than mere zero-sum games* in relations between different generations (Donati, 2002).

The mistake of the lib-lab systems is that of thinking such a solution can be achieved through a compromise between the State and the market. The relational (societal) approach, on the contrary, is founded on the belief that such a solution can only be achieved by instituting the principle of reciprocal subsidiarity among generations in all social fields.

In brief, the idea I would like to propose here is that forms of complex subsidiarity can be developed in those situations characterised by the considerable degree of freedom enjoyed by the subsidiary actors (fig. 4).

WELFARE SYSTEMS ACCORDING TO THE DEGREE OF REDISTRIBUTION (THE STRENGTH OF COLLECTIVE SOLIDARITY TIES) AMONG GENERATIONS IN WELFARE SYSTEMS, AND ACCORDING TO THE STRENGTH OF THE SUBSIDIARITY CRITERION IN SOCIAL POLICY			
		<i>Subsidiarity</i>	
		Low	High
<i>Redistribution</i> (ties of intergenerational solidarity in the various social welfare systems)	Low	Liberal market-based systems (ex post and residual subsidiarity)	Corporate systems (according to social category defined in terms of employment)
	High	Social-democratic systems characterised by a high degree of state regulation (subsidiarity as relief from individual responsibilities)	Complex subsidiarity systems (vertical and horizontal subsidiarity between generations)

Fig. 4.

⁸ For example, Esping-Andersen (2002) reduces the question of intergenerational solidarity to the fact that, in his view, more can be given to children and young people in general with little social spending. In this way, solidarity is seen as a political decision about how to spend market resources. However, we all know that the problem of solidarity is not one of the entity of expenditure, but of the way in which social spending is perceived and performed: that is, if spending is to be seen as a mere question of redistributing resources to the poor, or rather as a form of relational sharing among diverse subjects.

The philosophy underlying this model is that of maintaining welfare spending at a high level (albeit within the limits of sustainability), while at the same time regulating generational relations in such a way as to avoid the mistake of those welfare systems that confuse problems of intergenerational solidarity with poverty. In this way, we can avoid the vicious circle of high social welfare expenditure producing a high degree of fragmentation in intergenerational relations. The aims of the battle against poverty and of social cohesion may be better achieved by limiting the measures based upon the customary trade-off between the State and the market, and by promoting a complex subsidiary regime guaranteeing civil society freedom and responsibility, and thus strengthening the same civil society's role as the subject of its own institutions of intergenerational solidarity.

4. *The Role of the Family in Exchanges Between the Generations*

4.1. The discussion so far has underlined the fact that different current welfare systems and policies perceive the role of the family as mediator in intergenerational relations in very different ways. The *lib* model sees the mediatory role of the family as a primarily private, contractual question. The corporative model, on the other hand, assumes that there is a regulatory model of the family capable of instituting 'normal' (regulated) exchanges between generations. Finally, the *lab* model perceives the family's mediatory role as merely residual, since intergenerational solidarity must be based on the social rights of individual citizenship.

We now need to evaluate these various assumptions and their respective outcomes. I do not intend to do so in an ideological vein, but rather in an empirical manner. Thus we can start by saying that: the *lib* model ignores the fact that the family is an institution with public responsibilities, and as such it fails to see how so many public problems arise from the fact that society does not provide sufficient support to the family's social role; the corporative model, in turn, ignores the fact that the 'normal' model of the family has radically changed, and no longer corresponds, either in socio-demographic or cultural terms, to the old type of welfare system; the *lab* model, on the other hand, ignores the faults and failures of the welfare state in guaranteeing intergenerational solidarity as a right of individual citizenship, given that in many different areas of daily life, families have to compensate for the failings of the welfare state.

All of this points to the fact that present social policies have perverse effects, both intentional and unintentional, on intergenerational solidarity, since they fail to place sufficient importance on the family, when in fact the

family has been, and continues to be, the primary mover of intergenerational solidarity. What we need to do is to see whether there are any criteria (and if so, which criteria?) with which to evaluate if and when social policy valorises the family as mover of intergenerational solidarity. In my view, said criteria do exist, and are as follows: (a) the degree to which social policy considers, if at all, the family/non-family distinction; (b) whether social policy is capable of assessing the impact on family solidarity had by those measures adopted in order to balance relations between generations (Donati, 2003a).

All social policy models imply a certain idea of the family, and whether they intend to do so or not, they also encourage certain family relations and structures rather than others.

Even the United Nations has looked at this particular issue. In its Resolution no. 44/82 of December 1989, announcing 1994 as the International Year of the Family, the subject of which was to be 'The Family: resources and responsibilities in a changing world', the UN declared that: '*many social problems are getting worse, and the efforts made to resolve them are hindered by the inability of families to "function" as vital components of society*'. The situation needs a wider outlook and a greater effort, one focused on the questions and on the solving of the problems by governments and non-governmental organisations, with the support of international organisations'. Things have not improved, however, since this resolution was drawn up. There has been, admittedly, a growing awareness of the fact that each day it becomes increasingly urgent to act in order that greater intergenerational solidarity be established. Nevertheless, the family continues to appear more of a hindrance than an aid to the promotion of equity and solidarity between generations. Hence the question: can a change in this state of affairs be achieved?

4.2. The answer to this question depends on the choices made. If we consider the various social policy options in terms of the way they treat the family, three main arrangements within modern society emerge (fig. 5):

- (i) the privatistic arrangement (see fig. 5 for the analytical details);
- (ii) the interventionist arrangement (see fig. 5 for the analytical details);
- (iii) the subsidiary or societal arrangement (see fig. 5 for the analytical details, I give up commenting here).

I believe that the third of these arrangements is the one that most appropriately valorises the family as mediator between different generations; that is, as promoter of their reciprocal solidarity. Unlike the first two, this third arrangement recognises and promotes the family as a form of primary social capital (Donati, 2003b), and valorises the informal networks of intergenerational exchange (Sgritta, 2002).

THREE SOCIAL POLICY ARRANGEMENTS REGARDING THE ROLE PLAYED BY THE FAMILY AND THIRD-SECTOR ASSOCIATIONS IN INTERGENERATIONAL SOLIDARITY			
Types of configurations:	Expectations regarding family dynamics and third-sector organisations	Directions taken by action in support of intergenerational solidarity	Sociologically predictable results regarding intergenerational solidarity
(I) Privatistic arrangement (prevalent in the USA): generations perceived purely as an expression of family descent and a form of contractual tie	The family as a private contractual arrangement between individuals (in the case of the couple and in parent-children relations)	Intergenerational solidarity is a private affair	The family's difficulty in sustaining its relations with the children, and the fragmentation of generations
	Family reciprocity as a private affair	Limited public intervention	The erosion and weakening of intergenerational reciprocity
	Third-sector associations (e.g. family associations) as charitable institutions	Support for family associations as a form of help in cases of family need	Marginal role of associative services provided to families as generational networks
(II) Interventionist arrangement (lib/lab) (prevalent in European social-democratic nations): generations perceived as statistical cohorts that need to be guaranteed equal opportunities	Individualisation of individuals and increasing weakness of the family	Reinforcing of the parent-child relationship in the absence of a couple (e.g. mothers alone)	Increasingly fewer gifts, and an increasing number of forced maintenance obligations
	Fragmentation and breaks in the circuits of reciprocity	More rights for children and the weaker members in the family	Growth in 'generational poverty'
	Growth in the no. of families-of-choice and a rejection of 'compulsory altruism'	Abolition of incentives to solidarity among family members	Widespread individualism regarding entitlements
	The third-sector associations (family associations for example) as representatives of consumers	Reinforcement of their function of advocating social rights	Civil society's family associationalism as a form of lobby
(III) Subsidiary or societal arrangement (emerging in those European nations with a tradition of a corporative welfare state, according to a potential model of 'subsidiarity through reciprocity'): generations perceived as primary and secondary social capital	Intergenerational solidarity as a couple's project	Culture of the gift: tax exemption for donations between generations within the family and relatives sphere and for associations promoting intergenerational solidarity	Reinforcement of extended reciprocity between families and those generations that descend from them
	Increased rights for children but also for parents, within the framework of their reciprocity	Relational culture: individual rights and duties are to be exercised in relation to the effects they have on other family generations	Greater responsibility of parents towards children and descendants, and greater responsibility of children towards their ancestors
	Civil associations (e.g. family associations) as social subjects with advocacy and social enterprise functions in the organisation of intergenerational solidarity services and rights	Encourage families to invest in associative forms of mutual aid and in services supplied by associations (a 'citizenship complex' of rights/duties granted to the family and to those associations operating in favour of intergenerational solidarity)	Family associations as societal networks linking primary and secondary social capital

Fig. 5.

4.3. Let us take the example of pensions and the health service: what we have are three separate models. The privatistic approach envisages that pensions and healthcare be the responsibility of individual generations, and in real terms of the individual members of those generations, through the stipulation of private insurance policies to such ends. Those who fail to stipulate such policies may be eligible for some state help, but only in cases of dire need. The family does not play a decisive role in this model, since private insurance companies do not perceive the insurance of the family as such to be a source of profit. Could this be otherwise? The answer is no, if we assume that the market acts solely for the profit motive.

The interventionist approach, on the other hand, requires that the State create institutions of binding solidarity. The State may be supported, to a greater or lesser degree, by solidarity within society, seen as the propensity towards helping others in need, and on helping them according to a criterion of justice centred solely on the needs of individuals. In any case, this is the principle of the traditional welfare State, whose solidarity consists in distributing welfare benefits without any reference to merit or private initiative, but at the very most, choosing the target beneficiaries (social groups) on the basis of certain selective criteria (means tests). The family is perceived as a social burden, and is thus considered one of the criteria employed in assessing needs, according to its economic potential.

The subsidiarity model combines private enterprise with public intervention by means of measures designed to provide both vertical aid and horizontal cooperation. In other words, the political community operates in order that individuals and families are able to meet their own needs in as independent a manner as possible. This means that individuals and families are encouraged to help themselves both singularly and collectively. The State provides a basic degree of welfare insurance, over and above which it is up to the individual to take the initiative through intermediate institutions of solidarity providing either internal or external forms of mutual aid. The principle of solidarity is used here starting from the very design of welfare programmes: thus solidarity consists not only in the distribution of benefits through the collective redistribution of wealth (via taxation or other means), but also consists in the formulation and application of a series of complex criteria able to avoid the 'welfarism' that creates dependency on benefits and leads the welfare state to bankruptcy.

4.4. The societal configuration. In order to summarise the societal approach put forward here, I first need to explain the meaning I attribute to the idea

of 'complex solidarity'. Solidarity does not mean simply providing a helping hand to those in need, since a more appropriate term for such actions would be 'charity'. You can dress this concept up so as to make it appear a right of citizenship, but this does not change its essential nature: by turning an action into a duty, all we are doing is saying that we have an obligation to provide charity. Solidarity, on the other hand, is something very different from charity: it is a collective action designed to help those in need to solve their own problems through the exercise of the greatest possible degree of autonomy. It thus provides the means, but these means are not granted in the form of a pleasant concession by the political-administrative system or of an abstract right (only exercisable on government paper), but in the form of effective rights to individuals and families, who are then completely free to exercise such rights, and are thus fully responsible for their exercise.

Solidarity is perceived as having two different aspects by western culture, juridical culture included: it is seen as a *binding tie* between debtors (in the case of those obligations pertaining to a plurality of subjects, it is a binding tie whereby each creditor has the right to demand settlement of the entire credit, and each debtor can be forced to pay the entire debt); it is also perceived as a *form of fraternity*, of reciprocal aid, between the various members of a community. These two characteristics are interrelated when solidarity is seen as the interdependence of credits and debts based on the sharing of certain goods by the members of the community. Thus we are some way off the traditionally social-democratic idea according to which solidarity consists in the distribution of benefits in cash and kind to certain groups of needy individuals (Ullrich, 2002, p. 123). Whether these benefits are provided as a form of charity or as citizenship rights makes little difference when such measures maintain individuals and families in a state of dependency. Equity is something very different: it is justice perceived as the fairness of treatment of individual cases according to what is best in a given situation, rather than any uniformity of treatment.

Intergenerational solidarity is thus very different from equity. Although both involve the question of justice, the viewpoints adopted differ significantly. In fact, justice is perceived in various different ways, which may be briefly summarised as follows:⁹

(A) justice as *equity* consists in treating each person properly from the commutative point of view, and it thus means pursuing the equality of

⁹ The letters A, G, I, L refer to the dimensions of the AGIL scheme in its relational version (Donati, 2003a).

opportunity (rules designed to avoid all forms of illegal discrimination and to compensate situations of disadvantage within the community);

(G) justice as the duty to share (rule of the *redistribution* of goods);

(I) justice as the *reciprocity* of rights and duties;

(L) justice as recognition of human dignity and thus as the common right of each person to a decent standard of living; connected to the dignity of the individual, there are also the human rights pertaining to those primary social formations (communities and associations) in which people live.

By its very nature, subsidiarity implies solidarity, and it becomes complex when it conforms to all the above-mentioned characteristics and acts in such a way as to create a synergetic relationship between them. It thus includes the giving of benefits and the promotion of equal opportunities, while going beyond these limited characteristics and operating within a broader framework. What we define as intergenerational solidarity must comply with such prerequisites.

If we apply this to the field of pensions and healthcare, it means that all the actors involved must strive towards intergenerational solidarity, each according to his/her functions and criteria of action:

(A) within the economic field: businesses must treat generations in a suitable manner, avoiding any form of discrimination between them; moreover, they could encourage solidarity contracts whereby different generations share and share out work; banks could, or rather must, invest in those generations that are most at risk, such as young people who have to create a future for themselves, or the elderly who have to find somewhere to live and the necessary services in their old age; in doing so, the banks accept 'the reciprocity of the risks involved';

(G) the political-administrative system must guarantee sufficient redistribution in order to guarantee the social integration of the more disadvantaged generations; this regulation, however, must be such as to generate, rather than consume or cancel civil society's social capital;

(I) the world of non-profit, third-sector associations is the best suited to the creation of institutions of intergenerational solidarity based upon reciprocity;

(L) within families, solidarity between generations must be encouraged as a cooperative game involving systems of donation governed by the principle of reciprocity.

The 'subsidiary State' is a state that promotes a regulated differentiation between these spheres, together with their mutual synergy, in order to encourage a process of fair exchange between the different generations.

5. Conclusions and Prospects for the Future: The Creation of a New System of Institutions Based on Subsidiarity and Intergenerational Solidarity

5.1. In concluding, I would first like to draw up a correct definition of intergenerational solidarity.

If the problem of intergenerational solidarity is an ecological one (that is, if it regards the sustainability of the ecosystem), then the question of social responsibility comes into play, and bioethical criteria must be adopted in all spheres of society: in the market, the family, the State and the third sector. In fact, the problem lies in the environment of society as a whole.

If the problem of intergenerational solidarity concerns welfare state entitlements, then the main responsibility lies with the political system, since binding collective decisions are needed in order to balance the needs of diverse social groups. However, political decisions must take into account the manner (along with the guiding distinction relational/non-relational) in which these entitlements work within the vitally important spheres of family life and of associative networks.

If the problem of intergenerational solidarity lies within the primary networks, in the sense that it regards the strength of the informal social ties and everyday exchanges between generations, then what is needed is a series of criteria for the relational subsidiarity between all those actors in question; and the sub-systems that first and foremost ought to implement the said criteria are families and civil associations.

This diversity of functions and duties should not be seen as a conflict of viewpoints, but should be valorised by creating synergies between the various social spheres.

Intergenerational solidarity cannot be delegated to a specialised sub-system: it cannot be the duty of the State alone, or of the family, or of some aid agency or other. It is, on the contrary, a problem that needs to be dealt with by all of society's sub-systems. The failures and weaknesses of solidarity derive from the fact that individual sub-systems perceive the problem of intergenerational solidarity in different ways and wish to deal with it by employing different instruments and by adopting diverse courses of action.

The solution to the problem needs to be based on the subsidiary regulation of solidarity by all of the various sub-systems. However, in order that this be brought about, there is a need for social spheres in which subsidiarity is encouraged as a culture, that is, as a symbolic code that uses subsidiarity as a generalized means of communication and interchange. These spheres are institutions that pursue intergenerational solidarity as their natural, specific aim.

5.2. The question now remains as to what these new social institutions, based as I have said on the principles of solidarity and subsidiarity, are to look like.

We can try and define them in terms of the creation and use of existing resources at any given time and with regard to the future.

As far as the use of existing resources is concerned, limited examples of such new social institutions include: employment contracts shared among different generations; the creation of childcare facilities organised as networks run by parents together with childcare professionals; the creation of cooperative enterprises for the care of the handicapped and the non-self-sufficient elderly involving families who contribute towards intergenerational solidarity among themselves; swap or barter systems (like time banks) organised along family lines.

As regards investment for the future (minimum wage, pensions, welfare), economic enterprises can be set up to manage forms of insurance for families as well, rather than just for individuals. More generally speaking, bodies may be set up to formulate financial and social investment programmes for the new generations, by means of the involvement of various actors (banks, companies, associations representing the various professional categories). New forms of both internal mutual aid (mutual organisations) and of external mutual aid (public organisations) could be encouraged among those families who share the same generational problems. From the legal point of view, these institutions may be either private, public or mixed, given that what really matters is the organisational format based on the principle of subsidiarity.

To sum up, then, the principle of subsidiarity is considered to be the most suitable guiding principle in this field since it is based neither on profit (the exchange of monetary equivalents) nor on control (political power and the law), but on its own *model of action*, that of reciprocity as a rule of social exchange.¹⁰ Reciprocity can be exercised in a variety of ways. It may be limited to tight circuits such as that of the family and relatives, or may exist in broader circuits such as that of the entire local community (Caillé, 1998; Godbout, 1998). It may be generalised and even developed using processes of learning (Ullrich, 2002). Reciprocity clearly implies acknowledgement of the *Other* as the subject of rights, and through its exercise, tends to reinforce such acknowledgement.

¹⁰ I refer, in particular, to the work of writers such as J. Godbout (1998) and A. Caillé (1998) based on research by Marcel Mauss.

In order to create institutions of solidarity suited to future needs, the primary and secondary networks linking the various generations need to become social forces capable of developing the art of reciprocity and that organisational capacity I call 'subsidiary entrepreneurship' (Donati, 2004).

At the end of the day, it is the principle of reciprocity which, more than any other, proves capable of motivating and legitimising the construction of those social spheres in which the generations become those instruments of donation-exchange that guarantee intra-generational and inter-generational solidarity over the course of time.

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