

# Obligations to the Elderly and Generational Equity

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Do grown up children have obligations to their parents? Do the younger members of a society have obligations to their elders? Most people think that the question in both cases is answered by an appeal to the benefits which those now old conferred on the young: that children owe benefits to those who brought them into the world or brought them up; that the young of a society owe benefits to those who subsidised their upbringing and

education.<sup>1</sup> The obligation, in other words, is perceived to be one of reciprocity between people in different age cohorts or family generations. What distinguishes these cases is the existence of a considerable gap in time between receiving the benefit and making the return.

I am going to present and argue for a different approach to answering the above questions. I will argue that grown children have obligations to their parents and, more generally, the young to the old, not because of benefits received but because they have good moral reasons to participate in an intergenerational moral practice which requires the young of each generation to fulfil obligations to their predecessors. The view I am going to present construes duties of the young to the old as truly intergenerational responsibilities – and not as cases of delayed reciprocity. The people of each generation fulfil obligations to their elders and reasonably expect to be cared for in their turn by their children or other members of younger generations. I will argue that this way of looking at the matter not only avoids difficulties associated with other attempts to justify obligations to the elderly. It also provides a procedure for determining what these obligations are. In so doing it is in a good position to contribute to recent public debates about generational equity as well as to answer questions about family responsibilities for the aged.

An approach to these issues which derives responsibility for care for the elderly from a conception of intergenerational obligations may strike many people as counter-intuitive, implausible or even question begging. Counter-intuitive because it seems natural to think about duties to the old as a payment for benefits received. Implausible, for one thing, because what we think that members of younger generations ought to do for us may not be at all what the young are willing to accept as their responsibility. Question begging because it supposes that the young will have duties to us when we are old, but how can this be so unless it is assumed that they owe us something for the benefits they have received? Answering the last two questions requires that I spell out the approach that I advocate and show that it is not question begging or implausible. Answering the first requires that I explain what is wrong with the accounts which may seem intuitively more plausible.

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<sup>1</sup> The latter idea is not so often expressed. However, Richard A. Posner, *Aging and Old Age* (University of Chicago Press, 1995) takes it as commonsense: ‘Adults of working age pay taxes to support the public school system, in effect lending the young money with which to purchase human capital. The young repay the loan when they become adults of working age and the generation that paid for their public school education reaches retirement age, by defraying, through social security taxes, some of the living expenses and medical expenses of that generation’ (254).

## Love, Duty and Reciprocity

Though it seems intuitively plausible to think that we owe our parents, or the elderly in general, benefits for what we received from them in an earlier part of our lives, it is not so easy to explain why this is so.<sup>2</sup> The problem can be put in the form of a dilemma. What the old did to benefit the young was done out of duty or out of love (or sympathy or a feeling of identity). If it was done out of duty then there is no requirement of reciprocity. Parents, after all, have a duty to raise their children; members of a society have a duty to educate its children, and the young have no obligation to make a return for benefits they have a right to expect. But if benefits were given out of love or a similar motive, then no reciprocity is called for. Deeds done out of love should not ask for, or expect, a return, and the same is true for acts done by those who identify with their community and its present and future members.<sup>3</sup>

Here are some common ways of responding to this dilemma.

1. Admit that acts done out of duty do not require a return, but insist that a return should be given for deeds that are above the call of duty – to parents who make great sacrifices in order to benefit to their children or citizens who make a special effort to benefit posterity.<sup>4</sup>
2. Insist that there is no incompatibility between being entitled to benefits and being under an obligation of reciprocity for them. We are or ought to be grateful to our parents and to our forebears for the benefits they have bestowed on us even when they owed us these benefits. And if we are properly grateful, then we ought to benefit them in return.<sup>5</sup>
3. Insist that there is no incompatibility between acting out of love or sympathy and being entitled to a benefit in return. Relations of love and bonds of community can generate duties of reciprocity.<sup>6</sup>

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<sup>2</sup> For another discussion which reaches this conclusion, see Michael Collingridge and Seumas Miller, 'Filial responsibility and care of the aged', *Journal of Applied Philosophy* 14/2 (1997), 19-128.

<sup>3</sup> Another problem, often mentioned in the literature, is that children do not ask for the benefits that are bestowed on them and for this reason do not have a duty to be grateful.

<sup>4</sup> Nancy S. Jecker in 'Are filial duties unfounded?', *American Philosophical Quarterly* 26/1 (1989), 73-80 argues that we owe gratitude in one or more of the following cases: when a) parents perform acts beyond the requirements of duty; b) they perform required acts in a praiseworthy manner; c) fulfilling their duties is particularly burdensome; d) or fulfilling them is particularly beneficial. Jeffrey Blustein supports a similar conclusion in 'On the duties of parents and children' in *Southern Journal of Philosophy* 15 (1977).

<sup>5</sup> Mark Wicclair, in 'Caring for frail, elderly parents: past parental sacrifices and the obligations of adult children', *Social Theory and Practice* 16/2 (1990), 163-190 argues that we owe duties of gratitude for benefits that are essential to our well being even when they were provided to us out of love or duty.

<sup>6</sup> Jane English argues in 'What do grown children owe their parents?', in O. O'Neill and W. Ruddick, eds., *Having Children* (Oxford University Press, 1979), that our duties to parents are duties of a friendship that arises out of the sacrifices they have made for us.

It should be noted that all of these responses have some cogency. It does seem reasonable in many cases, indeed proper, to be grateful to those who have given you benefits – even when they have acted out of love or duty. It is especially proper to be grateful to those who have made special sacrifices for your sake. Nevertheless, all of the above strategies face similar problems.

The first is that it is not clear what actions require gratitude or what actions a grateful person should perform. It is proper to be grateful if someone goes out of his or her way to do you a favour, but presumably gratitude is not called for just because someone benefits you. Children probably have no duties of gratitude to parents who grudgingly did their duty; and it is doubtful that the young have to feel gratitude to those who benefited them simply by paying their taxes. But in between there is a lot of room for disagreement about what requires gratitude. Nor is it clear what or how much we are expected to do out of gratitude or love. Is it enough to show appreciation or do we also have to provide substantial benefits? What if care for elderly parents demands considerable sacrifice of our interests? Do we necessarily have to show our gratitude by benefiting our benefactors? Another way of making a return for the sacrifices made of our predecessors is to provide benefits to our successors.<sup>7</sup> Though philosophers have sometimes tried to provide criteria for when gratitude is required or tried to specify what it requires, I suspect that attempts to legislate about such things go against the grain of the concepts.<sup>8</sup> Love or relations between a benefactor and recipient would be different from what they are, and should be, if there were rules that demanded a return of benefits in specified situations and defined what kind of return was required.

The impossibility of being specific about when gratitude is due or what it requires is a problem for an account of duties of care for the elderly which makes the receipt of benefits (or benefits of a certain kind) a sufficient condition for having an obligation. But it is also difficult to explain why receiving a benefit should be a necessary condition. Many parents and elderly people through no fault of their own have failed to earn an entitlement to benefits: parents who were not able to provide for their children; people who were not able to contribute to the education of the young. It seems implausible that they should be denied benefits in their old

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<sup>7</sup> Lawrence Becker in *Reciprocity* (Routledge, 1986), 229-51 that appropriate way of reciprocating for what our predecessors gave us is to provide benefits for our successors. Admittedly he is concerned with predecessors who are no longer around.

<sup>8</sup> See for example, Fred Berger, 'Gratitude'. *Ethics* 85 (1975), 298-309, and A.D.M. Walker, 'Gratefulness and gratitude', *Proceedings of the Aristotelian Society* 81 (1980), 39-55.

age. But anyway, why should entitlement to benefits rest on past performance? Parents who performed their duties badly or people who grudgingly paid their taxes for schools also have needs in their old age which the young of their society surely have some responsibility for satisfying.

What these questions reveal is a general difficulty with an account of entitlements which makes them depend on benefits rendered – that is, with the very idea of founding obligations and entitlements on reciprocity. Critics of reciprocity theories point out two main failings, both of which are shared by the views that I have been examining.<sup>9</sup> Such theories, as we have seen, have nothing to offer those who have not made contributions – whatever their needs or interests. Moreover, reciprocity theories are often ill equipped to criticise the terms under which reciprocal relations have been established. Those who insist that children have duties to aged parents rarely have anything to say about which members of the family are expected to bear the burdens and whether this is a fair arrangement – or indeed about whether modern families should be expected to care for the old.<sup>10</sup>

### **The Subject-Centred Approach**

Those who think that individuals ought to be cared for in old age no matter what they contributed, or failed to contribute, to the well being of the young will be attracted to what Allen Buchanan describes as a ‘subject-centred’ approach to entitlement and obligation. In a subject-centred theory individuals have obligations and entitlements simply because of their status and not because of their deeds or the benefits they have received or have given to others. By status Buchanan seems to have in mind the condition of being human. According to Buchanan’s account, we have duties to others just because they are persons and as such are entitled to our moral consideration. But the status which confers entitlements on individuals might be membership in a community or a family. Christina Hoff Sommers argues that we owe our parents a duty of care simply because they are our parents.<sup>11</sup> Their status, and not any contribution to our well being, gives them entitlements and us obligations. Similarly a subject-centred view might

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<sup>9</sup> Two critics of justice as reciprocity are Allen Buchanan, ‘Justice as reciprocity versus subject-centred justice’, *Philosophy and Public Affairs* 19 (1990), 227-252 and Brian Barry, ‘Justice as reciprocity’, Eugene Kamenka and Alice Erh-Soon Tay, eds., *Justice* (London: Edward Arnold, 1979), 50-78. I draw mostly on the former.

<sup>10</sup> Caring for the aged has traditionally been a task for daughters or daughters-in-law. The issues that this raises are discussed in Stephen Post, ‘Women and elderly parents: moral controversy in an aging society’, *Hypatia* 5 (1990), 83-89.

<sup>11</sup> Christina Hoff Sommers, ‘Filial morality’, *Journal of Philosophy* (1986), 439-56.

insist that the young have an obligation to care for the old of their society just because they are fellow citizens.

A subject-centred view can overcome some of the difficulties associated with accounts of duties to the aged that depend on reciprocity. It does not allow us to ignore the needs of those who were not able to contribute – not even those who refused to contribute. It does not make care for the aged depend on motivations as unreliable or ill-defined as gratitude. But a subject-centred view of the matter has problems of its own. For one thing, it will often provoke the question of why a particular status should confer entitlements or responsibilities. We can't simply rely on tradition to answer this question, since traditions can be morally questionable or unfair to some members. Sommers view, which relies on traditional ideas about family rights and responsibilities, is open to criticism on these grounds.

Most people accept that they have duties to fellow citizens and, more generally, duties to other persons, but there is considerable disagreement about what these duties are and who is responsible for fulfilling them. It is not obvious to everyone that an appeal to the needs of the elderly – at least all by itself – can ground a systematic transfer of resources from the young to the old (as opposed to occasional acts of charity). A subject-centred view has to specify what the entitlements are, who has the responsibility for fulfilling them, and in doing so it will have to say something about how responsibilities are assigned and carried out.

A subject-centred view thus needs to be supplemented (as Buchanan's discussions allows). It is not enough to insist that people have particular entitlements - even when this is generally agreed. But there is a more serious difficulty. It is hard to shake the conviction that at least some obligations to the aged arise from requirements of reciprocity. This clearly so in some cases. Most people believe that they have a responsibility to honour people in old age who contributed a lot to their society. Most children think that that they do have a duty of gratitude to parents who made especially great sacrifices for their sake. Requirements of reciprocity can't account for all our duties to the aged, but surely they must play some role in any account of our responsibilities.

There is another reason for thinking that requirements of reciprocity must play a role in relations between the young and the old. Without this assumption it is difficult to understand, let alone take a justified position on, debates about generational equity. These debates have arisen because policies pursued by governments can affect generations (age cohorts) unequally. Most countries operate a 'pay as you go' system for funding old age pensions and other benefits to the elderly. This means that people born

in the 1920s or 1930s enjoyed, or are enjoying, a relatively high level of retirement and other benefits, paid for without much difficulty by the large generation born right after World War 2. However, benefits to this large cohort must be financed by the relatively small cohorts of people born post 1960. It is likely that the latter during their working lives will be forced to make greater sacrifices than their predecessors to support the elderly. The problem is compounded by increasing longevity and the growing cost of medical care. Whether this is an injustice is an issue in the debate, but to take a stand on the matter we have to have a way of determining what counts as a fair exchange of benefits and burdens between generations. A subject centred conception of justice, at least by itself, can't tell us.

In summary, the problem is this. Common ideas about obligations of reciprocity between children and parents and the young and the old are problematic. On the other hand, it seems that an adequate account of the responsibilities of the young to the old needs to appeal to some account of fair reciprocity between the generations. In the following sections I will put forward and criticise several candidates, concentrating particularly on the issue of generational equity.

### **Future-Directed Desires**

Let us start with the following truisms about human life. We know that it is inevitable that we will age and if we do not die first we face the prospect of declining powers, of no longer having an active, productive life or participating fully in the affairs of our society. Ageing and eventual death is inevitable. But everything else about our future is uncertain. We may remain active and competent up to the day we die. On the other hand, we may face many years of illness; we may become completely dependent on others. And the longer we live, the more likely it is that these things will happen or at least that our dependence on others will increase.

How should a rational person respond to this prospect? The answer depends on how she regards her future self. If she thinks of this self as essentially another person – someone whose fate is of no more a concern to her than any other individual, then from a purely self-interested perspective she has no reason to respond at all. But a person does not commonly regard the matter in this way. She assumes that she will age and become the person who might well have to be cared for by others. From this commonsense point of view our rational person has grounds for wanting this care to be available. He or she is also likely to want other things: that he be treated with dignity and respect in old age; that he be provided with resources that

enable him to live as good a life as possible given the interests and needs that he has at the time.

As a rational person you might respond to these reflections by taking out an insurance policy or by making a bargain with younger people – your children perhaps – giving them benefits now so that they will care for you later. One difficulty with this response is that it is difficult to construe the benefits that parents give to children as fulfilment of the terms of a bargain. Added to the problems already mentioned is the fact that children don't voluntarily sign up for this contract. But presumably a bargain could be struck with older children or with willing strangers. The problem remains that such an arrangement by no means guarantees that you will be cared for in your old age. The insurance company may fail; the other parties to the agreement may renege or simply not be able to keep their side of the bargain. You may need far more care than you bargained on. You may not be able to afford insurance or may have nothing to offer to younger generations.

People of a particular generation would on the whole be better off and would feel more secure about their future if they pooled their resources in a centrally managed fund which would pay out benefits at a later time according to need. Since a whole generation can be impoverished as the result of depression or war they would be even more secure if contributions to this fund were made not just by themselves but by younger generations. The most rational and satisfactory arrangement would allow for transfers between generations: rich generations providing resources which poorer generations can use.

This, roughly, is the justification provided by Norman Daniels for an institution that requires the young of a society to provide resources for the care of the old.<sup>12</sup> The motivation is self-interest along with a commitment to stick to a contract that is mutually advantageous. How a society arranges these transfers and how care is provided will of course depend on its traditions and other factors. It might provide resources to families so that they can more adequately care for the old or it may concentrate on providing community or institutional care.

The problem with such an arrangement is that it is likely to prove unstable. It might be unstable, first of all, because the rich could decide to take the risk of providing for themselves and not having to pay into a fund

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<sup>12</sup> Norman Daniels, *Am I My Parents' Keeper: An Essay on Justice Between the Young and the Old* (Oxford University Press, 1988). The difference is that to arrive at this conclusion, Daniels puts his agents behind a veil of ignorance where they don't know what age they are – thus ensuring that they can't privilege any particular age group.



that would provide benefits to the less well off. We could perhaps solve this problem (at least at a conceptual level) by putting our rational agents behind a veil of ignorance which conceals from them their class, gender, religion, etc. but not the facts about old age. In doing so we are of course bringing into the picture a moral idea – that of fairness between contemporaries. But even so, this change in the narrative would not make the arrangement stable. A rich generation might decide that it would be better off keeping most of its wealth to itself and not contributing to a fund that provides support to people of less wealthy generations. This would be a temptation particularly if their predecessors were on the whole badly off and/or their successors were likely to be worse off.

These difficulties suggest that rational prudence is not going to be a reliable basis for a fair exchange of resources between generations. It seems that fairness between generations has to be built into the foundations of such an account, and the veil of ignorance provides a familiar way in which we can do this. We can also conceal from our agents knowledge about what generation they belong to (whether a wealthy or a poor one) or we can make it impossible for them to assume that they are members of the same generation. Given this starting point and using the reasoning that Rawls has made familiar, agents are likely to agree on an generational difference principle: that inequalities in basic goods should serve the interests of least well off groups between as well as within generations.

However, there is a serious difficulty in applying across generations any distributive principle which assigns a share of social resources to individuals or groups. To put such a principle into practice, it must be possible to make a reasonably accurate estimate of the resources available for distribution. If such an estimate cannot be made, or if our estimates have a high probability of being wrong, then an application of the principle is all too likely to create unfair rather than fair distributions according to its own standards. For example, operating with the difference principle in circumstances of uncertainty may lead to the least well off getting a lot more than they ought to receive or a lot less. The same result could occur in applying a principle that requires individuals to get more at less equal shares of social wealth. There is always some uncertainty associated with public policy – a fact that simply has to be tolerated. But the more generations our principles are expected to cover, the more likely that injustice will be done.

To take a real example: it was generally assumed in the 50s and 60s that a pay as you go pension scheme was the fairest way of distributing burdens between generations. As the economist Paul Samuelson argued, 'Everyone who reaches retirement age is given benefit privileges that far exceed

anything he has paid in...How is this possible? It stems from the fact that the national product is growing at compound interest and can be expected to do so for as far ahead as the eye cannot see. Always there are more youths than old folks in a growing population. More important, with real incomes growing at some three percent a year, the taxable base upon which benefits rest in any period are much greater than the taxes paid historically by the generation now retired.’<sup>13</sup> In other words, a pay as you go system seems a perfect application of a principle of justice which requires a re-distribution from the relatively well off to those who are not so well off. The problem is that the optimistic assumptions made by Samuelson are mistaken. The population of many countries is not growing; average lifespan is increasing and so are the costs associated with medical care of the aged. The growth in real income has slowed down in many countries and the prospects for continued growth are more uncertain. Uncertainties associated with the labour market and expenses associated with having children leave the young with less disposable income.

What seemed like a fair distribution of benefits and burdens now seems increasingly unfair, and many governments have responded by adopting policies that decrease costs and public responsibility for pensions and care for the aged. For example, the Australian Federal Government has increased the retirement age and encouraged or required the employed to put some of their earnings in superannuation policies for their own retirement. Moreover, in its recent Intergenerational Report it has advocated a policy of fiscal sustainability – maintaining balanced budgets - as a way of ensuring that ‘future generations of taxpayers do not face an unmanageable bill for government services provided to the current generation.’<sup>14</sup>

These policies have two objectives. The first is to shift the burdens associated with an ageing population from the public purse to private pockets – to make individuals (and their employers) meet the costs of their old age, so far as possible. The second is to ensure that each generation pays for itself and does not impose serious costs on succeeding generations. These two objectives are independent. Each generation might avoid burdening its successors by paying into a publicly run insurance scheme which would collect and distribute funds to members according to a principle of distributive justice. On the other hand, achieving the first objective by no means guarantees the second. To obtain enough money for retirement, individuals might be encouraged to make investments that result

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<sup>13</sup> World Bank, *Averting the Old Age Crisis* (Oxford University Press, 1994), p. 105.

<sup>14</sup> *Intergenerational Report*, 2002-3 Budget Paper no. 5, p. 2.

in increasing costs to future generations (by destroying the natural environment, for example).

Nevertheless, the objective of ‘fiscal sustainability’, properly interpreted, might be regarded as a proper response to the problem of applying distributive principles across generations.<sup>15</sup> If we avoid, as much possible, activities that could inflict costs on future generations, then we will also avoid doing them an injustice. It is true that by following this conservative strategy we may be disadvantaging ourselves. Future generations may be much wealthier than we are. But if we act on this optimistic assumption and it turns out to be false, then the young and unborn could be seriously and unfairly burdened by policies that have favoured us at their expense. Once this is discovered it may well be too late. Presumably it is better to risk imposing comparatively heavier burdens on ourselves than doing an injustice to the young and not yet born – especially since the young and unborn are not in the position to object to our present activities.

So there is a reason for favouring a ‘cost avoidance’ principle of trans-generational justice rather than a difference principle (or something similar). But nevertheless a principle that requires us to avoid imposing costs on future generations is not exactly what we want. Suppose we are persuaded that it is a duty of justice to provide a considerable share of our resources to poor people in other countries. By doing our duty to these people we will be imposing costs not only on ourselves but also on the young and unborn of our society. There will be fewer resources available for their use. But if we are indeed acting justly, then the young and unborn will have no grounds for complaint. Similarly if we have a duty of justice to make reparations for wrongs our nation has done in the past, then we are justified in imposing costs on the young as well as ourselves. Such obligations of justice can trump the duty to abide by the cost avoidance principle. But the same might be said about duties to the old. If a society, a family or community has a moral duty to provide for its old – as subject-centred theories of justice insist – then surely doing so will often (if not always) take priority over ensuring that benefits we provide to the young outweigh burdens. What then is wrong with maintaining a generous pension or medical benefits scheme which is likely to impose comparatively greater burdens on the young and unborn?

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<sup>15</sup> However, I do not think that this objective implies a policy of balancing budgets. If by spending a lot of money right now a generation could make things much better for its successors (for example, by repairing environmental damage) then it would probably be doing the right thing even if it leaves them with a budgetary deficit. Presumably, avoiding costs to future generations means that the costs we impose should be outweighed by the benefits we provide.

How do we factor ‘bottom line’ moral demands into a scheme that requires intergenerational cooperation?

### **Future-Directed Moral Demands**

Let us return to our rational agents who face the prospect of old age and are aware that they are likely come to depend in one way or another on the care of their successors. These agents will have desires about how they are treated in old age, about how the needs and interests that they might well have at the later stages of their lives will be addressed. What’s more, they are likely to think that they are justified, or will in the future be justified, in making moral demands of their successors.

They are justified in making moral demands for the reasons rightly brought to our attention by the subject-centred theory of justice. They are members of our society who face the prospect of being needy. Possessing needs – some needs at least – is a justifiable basis for making moral demands. To be sure addressing demands to members of one’s family or society does not necessarily give anyone the responsibility of fulfilling them (even if they are morally reasonable demands). To assume that we can legitimately make moral demands of our successors (and rightly believe that they have a responsibility for fulfilling them), we have to suppose that we are operating in the framework of a intergenerational practice or institution – either one already in existence or being formed – which requires the young of each generation to fulfil justified moral demands of their elders. This means, of course, that we who make or anticipate making such demands have to be prepared to fulfil our role in this institution – that is, assume responsibility for fulfilling the justified moral demands of our parents and predecessors.

The view of intergenerational justice I am proposing embeds a subject centred idea of justice into an institutional framework. It marries a notion of reciprocity with the idea that individuals can make moral demands based on their status – at least their status as citizens who face the vicissitudes of human existence. Because people have special needs at the end of their lives just as they do at its beginning, it is not only rational, but morally mandatory, that a society have institutions to ensure that these needs are reliably satisfied. And when these institutions exist then individuals in them acquire responsibilities: both duties that arise from their role in the institution and duties in respect to the institution – to maintain it or reform it so that responsibilities are more efficiently and fairly assigned.

I will argue that this way of looking at the matter is a fruitful one. First of all, because it sheds light on the issue of what children owe to their aged

parents by providing a perspective from which judgments can be made about responsibilities that should be borne by the family and those which are more properly provided by public institutions. We are not required to adhere to traditional ideas about family responsibilities. Second, it can make sense, and put in a proper context, intuitive beliefs about what we owe our parents and forebears who have made sacrifices for us and laboured to give us benefits. And thirdly, it can provide, at least in outline, an answer to the issue discussed in the last section: what exchanges between generations are just.

Let us consider first the debate about duties of children – a debate which often requires making a judgment about what kind of care for the elderly ought to be provided by families and which should be the responsibility of society as a whole. The moral starting point from which all duties to the elderly follow is the assumption that those who face the prospect of old age are entitled, at least within the framework of a social order, to make demands of their successors. The question remains who these successors are and what can be demanded of them. The answers to both questions must depend to some extent on context. People in a wealthier society are likely to be entitled to demand more of their successors than people in a poor society. What successors can be regarded as responsible for meeting these demands will also depend on social conditions and institutions. But the vicissitudes of human life and the reasonableness of the idea that the old should be able to make demands on their successors means that we have a perspective from which we can pass judgments on particular social arrangements.

If there are few or any social institutions for the care of the aged in a society, then for practical reasons the only successors that the old can make demands on are their children or other younger members of their family. Because of the nature of the needs of the old and the moral imperative of attending to them, conscientious children in such societies are likely to regard themselves as compelled to meet these demands even at great cost to themselves. However, family based systems of care for the old were not fair to the family members who had to assume the burden and they were never able to ensure that the old would always be cared for in an adequate way. Wealthier societies – at least those properly responsive to the moral imperative posed by those who have special needs - have developed alternative or supplementary institutions for caring for the aged. Changes within families, especially in the roles of women, make it even less feasible for families to assume the full burden of care for the aged. Moreover, the aged in wealthy modern societies can reasonably make greater demands than

could their forebears for things that their society makes available, like medical care and opportunities to participate in a variety of social and leisure activities.

These considerations indicate that the provision of resources to meet the needs of the elderly (at least those they can't be expected to meet themselves) should be largely a public responsibility in societies like ours. Of course it doesn't follow that the old should be cared for in large, impersonal institutions. The needs of the elderly and the interests of family members might be better served by an arrangement which provides support to families or support to those who want to maintain an independent life as long as possible. How the needs of the elderly can be met by institutions which take into account the interests of others is a matter beyond the scope of this paper. The point made here is that this is best considered from the perspective of a view about intergenerational responsibilities and how they are affected by social conditions rather than by relying on traditional views about obligations to parents or the intuitive judgments of people who have been brought up in traditional institutions.

The old ought to obtain from their successors the resources they require in order to live a life they can find satisfactory given their capabilities. This requirement depends on their status as persons and members of a society and not on the contributions they have made. It is not conditional upon them making a contribution of any kind. My account escapes circularity by resting its moral case on a subject-centred foundation. It does so without an unquestioned acceptance of the responsibilities associated with particular institutions like the family. On the other hand, there is also room in my account for duties of gratitude or friendship.

To see why this is so, let us return once again to the agents who are determining what they can reasonably demand of their children or successors. They will of course regard themselves as entitled to have their basic needs satisfied. But they are also likely to demand that they be respected and honoured for the sacrifices they have made and for the benefits that they have bestowed on their successors. This demand seems reasonable because it is important to most individuals that they be appreciated for the contributions they made – even when they did not act in order to be appreciated – and as their lives come to a close, it is likely to become more important, even essential to their existence having meaning, that others acknowledge what they did or tried to do in their lives. Those who face the prospect of old age are thus likely to make the demand that their children or others they have made sacrifices for, appreciate what they have done. The reasons for this demand are reasons for the existence of a

practice of showing appreciation for and honouring the contributions of those now old. There are other reasons for the existence of this practice. Remembrance of what was done or suffered by past generations is one of the factors which binds a society, community or family together and motivates further contributions to the common good, and individuals who care about the future of their society, community or family are likely to demand recognition for their contributions for this reason as well as others. What deeds should be honoured and how they should be honoured is going to depend on the society in question and the beliefs of its people. But it is reasonable to suppose that the duty to respect and appreciate is going to fall mostly on members of families. It is to members of their family, especially their children, that most people make their biggest contribution.

If this reasoning is accepted then it follows that most of us do have a duty of gratitude toward our parents and to others who have made sacrifices for us or our society. The intuitive idea that we owe something to our parents for their sacrifices has a foundation in considerations of intergenerational justice. But the elderly do not have to depend on our gratitude in order to justify their entitlement to resources. And the fact that children often have a duty to appreciate the sacrifices of their parents does not make them responsible for their care.

There is a further limitation to duties of gratitude and respect. What we believe to be our obligations to the elderly depends on our moral perspective. Judgments made about these obligations by one generation may differ from those of its predecessors and successors. This is especially likely to be true concerning demands for respect and appreciation. Successors may have no respect for deeds that their predecessors regarded as a source of pride, and given that this is so, they have no duty to appreciate them. This means that there is likely to be generational conflict about some matters and that the elderly will sometimes be disappointed by a failure of the young to do what they (the elderly) perceive to be a duty. This is something that simply has to be accepted. But it should be noted that there is not likely to be much generational disagreement about moral imperatives arising from needs that are an inevitable result of the human condition.

It remains to consider how my perspective bears on the debate about generational equity. First of all, it seems reasonable to insist that a society has an obligation to provide resources to the aged (just as it has a duty to provide resources to children), and members cannot shirk this duty just because it is comparatively more difficult for them to perform than it was for their successors, or because satisfying the entitlements of the aged is likely to impose costs on the young and unborn. However, the duties we have in

respect to an intergenerational institution which provides care for the aged requires us to take steps to establish a fair division of responsibility between generations for maintaining it.

This responsibility exists for two reasons. The first is pragmatic. We have a duty to maintain the institution and any policy that weakens it – that makes it less likely that future generations will maintain it – ought to be avoided. If our policies are likely to make it much more burdensome for the young to provide resources for the old, then they may be tempted to cut or even abolish public support for the aged – leaving it once again to the family to provide most of the care.<sup>16</sup> If they were to respond in this way they would be doing something morally wrong (unless their resources were desperately needed for a more important purpose), but they might nevertheless be inclined toward this response. We should not make it too difficult for our successors to act morally.

But even if our successors make the necessary sacrifices and continue to provide care and support for the old, it is difficult to avoid the impression that they would be forced to do more than their fair share in an institution which we all have a moral as well as pragmatic reason for maintaining.<sup>17</sup> In other words, we would not be fulfilling in a proper way our duties in respect to a morally important intergenerational institution. This would not be true if we happened to be too poor to lay aside extra resources for the care of our elders (if for example our economy was crippled by depression or we were forced to pay for a war of self-defence). In this case we would be justified in imposing a comparatively greater burden for maintaining the institution on our successors. But if we know that our society faces a demographic imbalance and we are wealthy enough to accumulate savings so that the burden to the young and unborn of providing resources to the elderly is diminished, then our duty in respect to the institution, and to those who have a joint responsibility for maintaining it, requires that we save. It may turn out that the next generations will be extremely wealthy and that paying for a larger cohort of the elderly will be no great burden for them. But if we operate according to the principle that it is better to make a sacrifice than to

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<sup>16</sup> David Thomson: *Selfish Generations?: The Ageing of New Zealand's Welfare State* (Wellington: Bridget Williams Books, 1991), argues that by failing to avoid generational inequity, present generations are destroying the social welfare system. The young are not likely to continue to support schemes that treat them so unfairly.

<sup>17</sup> Andrew Levine, 'Just social security', *Public Affairs Quarterly* 12 (1998): 307-332 argues (rightly) that care for the elderly is a 'public good' which each generation should support. But he argues (wrongly in my opinion) that there is no such thing as generational inequity as far as contributions to pension schemes are concerned.



risk imposing an unjust burden on our successors, then we are still required to save even when we think that the next generations might be richer.

### **Conclusion**

I have offered a perspective from which judgments can be made about issues which have often been treated separately. One of these is the question of what children owe to their elderly parents. The other is the issue of what (if anything) the young of a society owe to the old and whether demographic imbalance raises issues of justice. From my perspective both of these matters have to do with relations within intergenerational institutions which are founded on justified moral demands. The young of each generation have obligations to care for the old and to appreciate their contributions. But how these responsibilities should be fulfilled, and what role members of families should play in fulfilling them, depend on their nature, the organisation of a society and its other moral commitments.



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