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Intergenerational Justice and Public Policy in Europe



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Introduction

Population aging wide across the advanced welfare states has led to a renewed popular awareness of the notion of justice between the generations, but also to renewed academic interest. However, efforts to measure intergenerational justice empirically have largely lagged behind. How can we improve policies when we do not know the state of affairs in terms of intergenerational justice in *practice*? At the request of the Bertelsmann Stiftung, I have therefore developed a simple four-dimensional snapshot indicator to improve the cognitive toolkit of academics, journalists and policymakers. This paper reports on the Intergenerational Justice Index (*IJI*), and on how EU member states perform along its four dimensions (Vanhuysse 2013).

The *IJI*'s aim is pragmatic and empirical: to compare intergenerational justice in practice across rich, aging welfare states. The analysis is synchronic not diachronic. The unit of analysis is countries, and the *IJI* reflects a macro-level notion of justice as linked primarily to government activity rather than private behavior. The snapshot was taken based on the years for which the most complete recent data was available for 29 OECD countries: the end of the 2000s or the start of the current decade, depending on the dimension.

Sustainability is the moral starting point: in terms of the available opportunities for valued capabilities and resources, 'enough and as good' ought to be left by each generation to the next.

Sustainability is the moral intuition behind the *IJI*, as with other work done by the Bertelsmann Stiftung on sustainable governance indicators. In terms of the available opportunities for social security, education, the environment, and other valued rights, capabilities and resources, 'enough and as good' ought to be left by each generation to the next (Barry 1997; Padilla 2002; Van Parijs 2011). In aging welfare states, population aging as a demographic concept is viewed largely as an ethically neutral development for my purposes. A society, or cohorts within it, are not morally blamed for lower fertility and longer life expectancy. But the way in which a country's social and public policy models react to demographic change is not neutral from an intergenerational justice perspective.

1. Three outcome dimensions; one policy effort dimension

Three of the *III* dimensions, two of which are strongly policy-determined, measure outcomes that leave legacy burdens towards younger and future generations: the ecological footprint created by all generations alive today; early-life starting conditions as measured by child poverty levels; and the fiscal burdens on the shoulders of currently young generations, as measured by public debt levels per child. The fourth *III* dimension measures policy effort in the form of a new synchronic indicator of the overall pro-elderly bias in social spending, or *EBiSS* (Vanhuysse 2013).

- 1) The intuitive appeal of the ecological footprint is that it captures in a single figure (measured in global hectares per capita of the population) the general pressure put by human societies on their natural environment. Within Europe, Denmark and Belgium produced the biggest environmental pressure in the late 2000s, followed by countries such as the Netherlands, Finland, Ireland and Sweden. On the environmentally friendly side of the spectrum, European societies such as Hungary, Poland, and Portugal all produced relatively small ecological footprints. But once one compares the ecological pressure put on the environments with the environment's capacity to absorb that pressure, only Finland and to a lesser extent Baltic and Nordic countries such as Sweden, Estonia and Norway (all of which have vast forest surfaces) turn out to be net environmental creditor countries in Europe, in the sense that they impose less pressure than they can absorb. By far the largest environmental debtor countries in Europe were Belgium and the Netherlands, followed by other high-density countries such as Italy, Spain, Greece, Denmark and the United Kingdom.

Only some forest-rich Baltic and Nordic countries are net environmental creditors, whereas small, high-density countries such as Belgium, the Netherlands and Denmark, but also Southern Europe, are significant environmental debtors.

- 2) Child poverty, the second dimension, is important for intergenerational justice as it can create dynamic knock-on effects reaching far into poor children's subsequent lives and which start from birth onward – indeed, even from before birth. These range from lower levels of school readiness and early educational outcomes, to lower cognitive and behavioral skills and lower high school completion rates, and later still to lower wages and home ownership rates and higher rates of adult unemployment, welfare dependency and poverty, and so on. Using a relative measure of child poverty, Southern countries such as Portugal, Spain, Italy and Greece, but also Poland and the UK, performed worst within Europe. Nordic countries, but also Austria and Slovenia, occupied the bottom five (best) ranks (see also UNICEF 2013).

Nordic countries generally have the lowest levels of child poverty, and Southern countries the highest levels.

- 3) To measure the debt burden weighing on the shoulders of the currently young, I calculated the total general government debt for each country in 2011 per person aged 0-14. The variance in debt per child within the EU was large. Italy and Greece occupied the highest ranks, followed by Belgium, Germany, Norway, Austria and Ireland. At the other end of the spectrum, poorer Central and Eastern European countries such as Estonia, the Visegrad-4 and Slovenia currently saddle their youngest generation with comparatively low levels of government debt.

- 4) The fourth dimension of *III* measures welfare states' overall pro-elderly bias in social spending, or *EBiSS* (¹). On the *elderly*-oriented spending side, the *EBiSS* numerator includes old-age-related benefits in cash and in kind survivors benefits in cash and in kind, disability pensions, occupational injury and disease-related pensions, and early retirement for labor market reasons. On the *nonelderly*-spending side, the *EBiSS* denominator includes family benefits in cash and in kind, active labor market programs, income maintenance cash benefits, unemployment compensation and severance pay cash benefits, and all education spending. To control for demographic structure, the resulting elderly/nonelderly social spending ratio has been adjusted by means of each country's old-age support ratio (the number of persons aged 20–64 over the number of persons aged 65 or more). Since public health spending, a major elderly-oriented spending item everywhere, has not been incorporated into these *EBiSS* calculations, the *EBiSS* as defined here almost certainly *underestimates* the pro-elderly bias of welfare state spending (Vanhuysse 2013).

As Figure 1 shows, the least pro-elderly biased European welfare state in the late 2000s was Ireland. Europe is more strongly represented at the other end of the spectrum: EU member states occupy 8 of the 9 highest *EBiSS* positions. Poland was the most pro-elderly-biased welfare state in the sample: the state spent 8.6 times as much on each elderly Pole as it spent on each nonelderly Pole in the late 2000s. Following at some distance, Greece and Italy (*EBiSS* values around 7 or more), Slovakia, Japan, the Czech Republic and Portugal (between 6 and 7), and Slovenia and Austria (above 5.5) all have very high *EBiSS* values as well.

1. For earlier attempts to measure pro-elderly spending bias, see Lynch (2006), Tepe and Vanhuysse (2010), Gamiel-Yehoshua and Vanhuysse (2010).

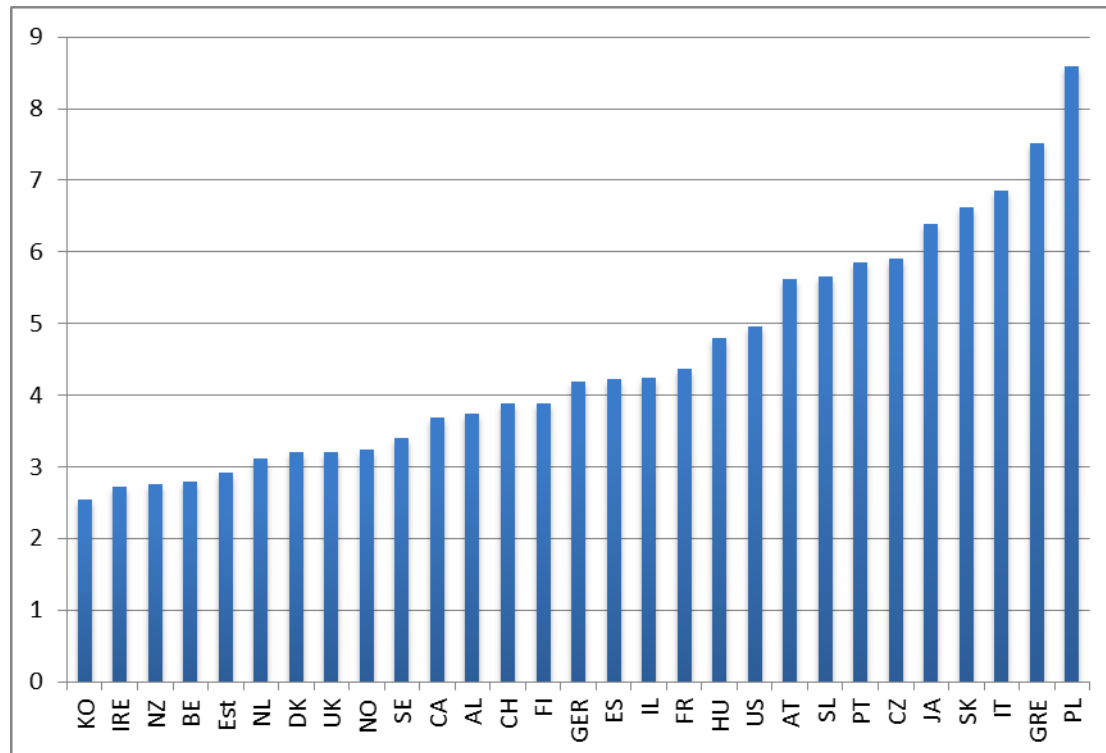
EU member states occupy 8 of the 9 highest positions on the pro-elderly-bias of welfare states. Poland was in pole position, followed by Southern and Eastern European countries and Austria.

The equity question here too is essentially a matter of sustainability (Van Parijs 2011; Barry 1997). In theory, one could argue that any particular value of the *EBiSS*, which is a snapshot of how different *age groups* are treated at one point in time (today), is morally unproblematic. Unproblematic, as long as the same value applies to successive *cohorts* over time (unless of course successive younger cohorts explicitly agree to reduce their expected lifecycle benefit/cost ratio compared to older cohorts). But the burden of proof then falls on those making such a seemingly Panglossian argument. They must then demonstrate that the high Polish, Greek or Italian *EBiSS* values in Figure 1 really reflect democratically desired 'Spartan childhood for luxury old age' tradeoffs, *and* that such values are sustainable over time.

As it happens, mounting evidence indicates that younger age groups today increasingly doubt the intergenerational equity of current policy patterns - with good reason ⁽²⁾. Moreover, different non-snapshot methods such as National Transfer Accounts indicate that in all European countries studied (but in few other countries), public transfers already tend to flow from non-elderly to elderly groups today (Lee and Mason 2011). Chauvel and Schröder's (2014) age period cohort analysis similarly shows that continental-conservative and Southern European welfare states are particularly inequitable toward cohorts born after the post-World War II baby boom. Of course, *EBiSS* figures refer purely to public spending efforts. Net private transfers in Europe still flow from older to younger age groups. But in a number of countries, these private flows are no longer large enough to offset the public transfer flows in the other direction. For instance, in Germany, Austria and Slovenia the net direction of *total* transfers is now from non-elderly to elderly groups (Lee and Mason 2011). This amounts to 'a sea change in human history' (Lee 2013: 33).

Demography is *not* destiny as regards the pro-elderly bias of European welfare states. Instead, it is policy choices as determined by longstanding governance cultures that drive *EBiSS* patterns (Lynch 2006; Goerres and Vanhuyse 2012). Of the OECD's four demographically oldest societies, Italy (*EBiSS* value of 6.9) and Japan (6.4) showed a distinct pro-elderly bias in their social spending patterns at the end of the 2000s, whereas Germany (4.2) showed only a moderate and Sweden (3.4) relatively low pro-elderly bias. Conversely, the Irish, Belgian and Estonian welfare states all spent roughly 2.5 to three times as much per elderly citizen as per nonelderly citizen, even though Ireland was a demographically young society (old age support ratio 5.6), whereas Belgium and Estonia are much older societies (old-age support ratios of respectively 3.5 and 3.6).

2. For instance, in a study of more than 2,000 undergraduate university students from eight democracies across four worlds of welfare, younger working-age adults (aged 18-35) are systematically perceived to be treated worse than either older working-age adults or the elderly (Sabbagh and Vanhuyse 2010). On perceived *pension* injustice specifically, see Sabbagh and Vanhuyse (2014).

Figure 1. Elderly Bias Indicator of Social Spending (EBiSS)

Source: Vanhuysse (2013: 27).

The spurious connection between demographic structure and pro-elderly policy bias can also be illustrated differently. In the demographically old Greece, the state spent seven times more for every elderly Greek as it spent for every non-elderly Greek. But in comparably old Sweden, the state spent only 3.4 times more. In the absence of evidence indicating that they truly reflect legitimate 'Spartan-childhoods for luxury-old-age' tradeoffs agreed to by successive cohorts in Greece but not Sweden, the higher Greek *EBiSS* values appear unsustainable, hence intergenerationally inequitable.

The strong impression of intergenerational inequity is further strengthened by analysis of the distributional impact of the radical social policy reforms and cutbacks implemented in Greece after the severe post-2009 recession. Poverty rates have gone up more among young and working-age than among 65+ age groups after 2009 (Matsaganis and Leventi 2013: 95). And while middle-aged and older age groups have shouldered a share of the burden of austerity policies through the abolition of 13th and 14th pension months and the introduction of pensioners' solidarity taxes, social reforms have also favored powerful lobby groups defending privileged social benefits (not least pensions) for unionized workers in nationalized industries and for professions such as judges, engineers and medics, as against younger age groups and recession losers such as the unemployed (especially youth) and young families (Matsaganis 2013).

2. The special trouble with Central Europe: legacies and logics of pro-elderly bias

Within the European Union, in addition to three 'usual Southern suspects' (Greece, Italy, and Portugal), it is Central European member states such as Slovakia, the Czech Republic, Hungary, Slovenia and (especially) Poland that seem to have the most pro-elderly biased welfare states according to the *EBiSS* measure. This is congruent with a different measure specifically on children - UNICEF's (2013) five-domain, 26-dimensional indicator of child wellbeing for 29 countries. Slovakia, Hungary and Poland also occupy bottom-third ranks on this measure, with the Czech Republic and Slovenia occupying 14th and 12th rank.

Pairwise comparisons are illuminating on the *EBiSS*. The welfare state in 'middle-aged' Hungary (old age support ratio of 3.9) spent 4.8 times more on every elderly as on every non-elderly citizen in the late 2000s (for a National Transfer Accounts approach, see Gal et al. 2011). But in slightly older Estonia (with a lower old age support ratio of 3.6), the welfare state spent only 2.9 times more. The 'young-to-middle-aged' Czech Republic (old age support ratio 4.5) spent 5.9 times more on every elderly as on every non-elderly citizen, but equally young-to-middle-aged Australia spent just 3.7 times more.

In the same vein, the welfare state in 'young' Slovakia (old age support ratio 5.5) spent 6.6 times more on every elderly citizen, but in the equally young Ireland it spent only 2.7 times more. And as we have seen, Poland still occupied pole position on the *EBiSS* in the late 2000s - a decade after the implementation of a significant systemic pension reform in 1999 (Gora 2013). In this 'young-to-middle-aged' society (old age support ratio 4.8), the state spent 8.6 times as much on every elderly Pole as on every non-elderly Pole in the late 2000s. Yet in the equally young New Zealand, the state spent only 2.7 times as much.

Hungary spent 4.8 times more on every elderly as on every non-elderly citizen, yet slightly older Estonia spent only 2.9 times more. The Czech Republic spent 5.9 times more on every elderly citizen, but equally young-to-middle-aged Australia only 3.7 times more.

Here too, in the absence of evidence of democratically expressed rolling contract agreements between successive cohorts to trade off low state spending early in life for generous spending later on, these higher Central European *EBiSS* values strongly indicate (but do not conclusively demonstrate) unsustainability. They can be explained largely as a result of legacies of early post-communist transition, such as 'familializing' state approaches towards mothers and children, and policy-induced, historically unprecedented exit into early and disability pensions. For instance, Hungarian and Polish governments in the early 1990s attempted to reduce the threat of large-

scale reform protests by splitting up groups of at-risk workers into competing work-welfare status categories, including pensioners (Vanhuysse 2006a, 2009). In the first seven years of democracy alone, literally hundreds of thousands of working-age Hungarians and Poles (Vanhuysse 2004), but not Czechs (Vanhuysse 2006b), were incentivized to exit into early and disability pensions by means of more generous and better protected pension benefits relative to 'younger' programs such as unemployment and family benefits.

Slovakia spent 6.6 times more on every elderly as on every non-elderly citizen, but the equally young Ireland only 2.7 times more. Poland tops the EBiSS rankings with a value of 8.6, yet the equally young New Zealand has an EBiSS value of just 2.7.

These policies led to an immediate reversal of poverty trends for pensioners (downward) relative to other age groups (upward) after 1989, and to Great Abnormal Pensioner Booms (Vanhuysse 2006a). Whereas the number of 60-plussers remained stable in Hungary and grew by 10 percent in Poland between 1989 and 1996, the number of old-age pensioners increased by respectively one-fifth and 46 percent. In the same period of just seven years, the number of disability pensioners also increased by one-half in Hungary and by one-fifth in Poland (Vanhuysse 2004).

Subsequently, a cross-party coalition in Poland has overruled a Presidential veto in order to further address the macro-fiscal sustainability of its pension system through a bridging pensions law restricting early retirement from 2009 (Gora 2013). Sustained economic growth over the past decade, including in the post-2008 crisis years, has served to further alleviate immediate fiscal and sustainability worries in Poland, as has a more recent refocusing on education investment. Nevertheless, electorally powerful groups such as peasants, and politically mobilized groups such as prosecutors, the uniformed services and miners all remain exempt even from the 1999 pension reforms today (Gora 2013) and two-thirds of contributions to the first, fully funded pension pillar were redirected to the first pay-as-you-go pillar in 2011 (Drahokoupil and Domonkos 2012). By contrast, in Hungary pension spending remained subject to electoral business cycles throughout the late 1990s and early 2000s. In 2011 the two-thirds majority FIDESZ government even renationalized a previously privatized pensions pillar worth around 10 percent of GDP (Kemmerling 2013; Drahokoupil and Domonkos 2012).

Jointly, such policies, and the pro-elderly political-electoral logics they have set in place, have prepared Central European badly for the coming three decades, as this region is today entering a period of accelerated demographic aging. This further points to the unsustainability of current levels of pro-elderly spending bias in this region.

Policy legacies such as Great Abnormal Pensioner Booms and continuing adverse labor market, lifestyle and health policy cultures today combine with fast population aging in the decades ahead to add up to an alarming 'generational politics' picture for Central Europe.

Health technologies and health lifestyles also appear to lag behind in Central European countries. One way to show this is by remeasuring old age dependency ratios by aggregating people's remaining or *prospective* life expectancies (that is, how many birthdays they will still celebrate), rather than their chronological ages as is usually done (how many birthdays they have already celebrated) ⁽³⁾. In terms of physical fitness, for instance, a chronological age of, say, 70 today does not mean the same thing it did three or four decades ago. It turns out that using these alternative (prospective) old age dependency rates actually produces far less dramatic trends in current and projected levels of population aging for most EU countries. But there is one notable exception to this observation: the Central European democracies. These latter countries show fast-worsening trends also in prospective old age dependency for the near future (Sanderson and Scherbov 2010).

The lack of preparedness of Central Europe, and even more specifically three of the Visegrad-4, countries is also evident in the European Centre Vienna's (2013) four-domain, 22-dimensional Active Aging Index for Europe. Slovakia, Hungary and Poland occupy the bottom three positions in the 27-country sample on the overall AAI, whereas the Czech Republic ranks in 11th and Slovenia in 21st position. In addition, these same three Visegrad countries occupy three of the bottom five positions on the AAI's four-dimensional 'elderly workers' employment' domain index, with the Czech Republic in 14th and Slovenia in 19th rank. And they also occupy three of the bottom five positions on the AAI's six-dimensional 'capacity and enabling environment for active aging' domain, with the Czech Republic and Slovenia again ranking 14th and 19th (on older worker activation policies, see e.g. Gasior et al 2011; Marin 2013).

In sum, adverse labor market, lifestyle and health policy cultures in the past two decades, combined with fast population aging in the next two decades, add up to a bleak 'generational politics' picture for Central Europe.

3. Sanderson and Scherbov's (2010) *prospective* old age dependency ratio is defined as the number of people in age groups with life expectancies of 15 or fewer years, divided by the number of people at least 20 years old in age groups with life expectancies greater than 15 years.

3. The Intergenerational Justice Index: results and implications

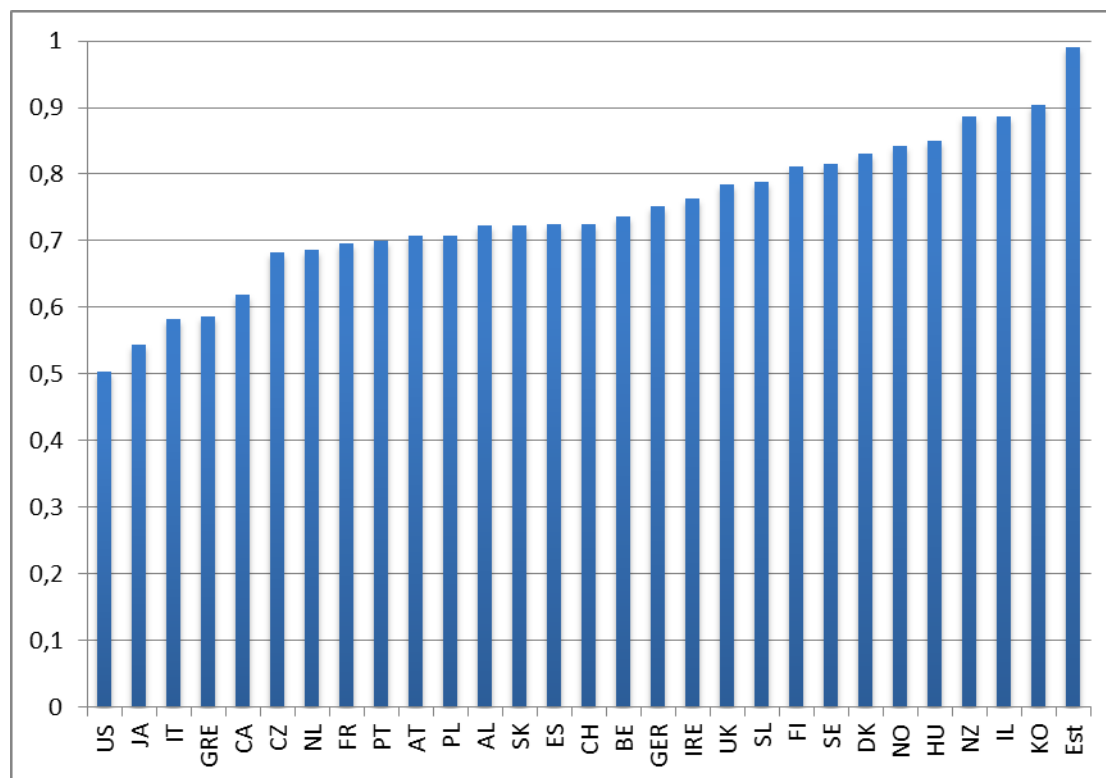
The four *IJI* dimensions discussed above were then normalized (⁴) and aggregated into an overall *IJI* value ranging from 0 (least equitable) to 1 (most equitable), using a 'benefit-of-the-doubt' weighting method to respect the (revealed) preferences of democratically elected governments. As Figure 2 shows, among the most intergenerationally just countries were Estonia and all of Nordic Europe (in addition to South Korea and New Zealand). By contrast, among the least intergenerationally just countries were Italy, Greece and the Czech Republic (but even more so the USA and Japan).

Estonia and all of Nordic Europe were among the most, and Italy, Greece, and the Czech Republic among the least intergenerationally just EU countries.

Clearly, these snapshot findings are only indicative, and they are best viewed as focusing a laser beam in order to highlight best-case and worst-case examples, thereby inviting more thorough case study analysis. More research needs to be done, ideally involving time series data and cohort approaches (e.g. Chauvel and Schröder 2014; Lee and Mason 2011), to enrich the snapshot analysis presented here. But it seems plausible to state that unless low-*IJI* countries such as the USA, Japan, and, in the EU, Italy and Greece can somehow guarantee fast economic and productivity growth and rapid technological innovation (including in environmental technology) in the near future, not reforming current policy patterns would most likely mean that a high degree of injustice continues to be inflicted upon currently young and future citizens.

4. To normalize the four *IJI* dimensions (ecological footprint, child poverty, debt per child and *EBiSS*), for each country *i* and each dimension *x* the difference is taken between the maximum performance in the entire OECD sample (*xmax*) and the actual performance of country *i* (*xi*). This difference is then divided by the difference between the maximum (*xmax*) and minimum (*xmin*) performance in the 29-country set. The normalized values *xni* can thus be expressed as: $xni = (xmax - xi) / (xmax - xmin)$. In other words, the denominator is given by the difference between the maximum value and the minimum value in the OECD country set. The numerator is given by the difference between the maximum sample value and the value achieved by the country under consideration. This implies that a better relative performance is associated with a higher value, with each *xni* value varying between 0 and 1 (Vanhuysse 2013).

Figure 2. Intergenerational Justice Index (IJI) with benefit-of-the-doubt (.4/.3/.2/.1) weighting



Source: Vanhuyse (2013: 37).

On the policy supply side, seemingly 'obvious' measures that merit a new look in light of the *IJI* perspective include fiscal and social security benefits or credits to reward family members for raising younger and caring for elderly generations (often expending substantial private cost for societal benefit); the adjustment of official pension ages and pension benefits to rising life expectancy (e.g. Marin 2013); and ecologically motivated tax frameworks such as carbon taxes. There is a particularly strong case for spending more on high quality early childhood education and similar social investment policies that increase human capital and skills and bolster the fiscal basis of aging welfare states in the process ⁽⁵⁾.

But the hard power *politics* of population aging matters crucially, too (Vanhuyse and Goerres 2012; Tepe and Vanhuyse 2009, 2012). When 'obviously' sound policies are not sufficiently implemented, wishfully thinking such policies into existence is not likely to be an effective strategy. Children are also *public goods* (Folbre 1994; Folbre and Wolf 2013). They need to be valued as such by public policies in rapidly aging welfare states. The time is ripe for at least reopening an empirically informed democratic debate about the radical idea of giving each parent one half extra vote, to be used on behalf of each under-age child until that child reaches legal voting age. These proxy votes for children or Demeny votes (Demeny 1986; Sanderson and Scherbov 2007; Van

5. In economics, see especially the work of James Heckman (e.g. Carneiro and Heckman 2003; Cunha and Heckman 2009; Doyle et al. 2009; Heckman 2000). In public policy, see for instance Esping-Andersen (2008); Morel et al. (2012); Vandenbroucke et al. (2011); Vanhuyse (2008).

Parijs 2011) could be made conditional on parents guaranteeing minimum child welfare, and they could otherwise be regulated according to a host of civic requirements deemed desirable in an open democratic debate. On the policy demand side, proxy votes would add hard power to the claims of younger generations in aging societies, as they could significantly alter the incentive structure and the temporal horizons of elected policymakers.

Further reading

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[http://www.sgi-network.org/pdf/Intergenerational Justice OECD.pdf](http://www.sgi-network.org/pdf/Intergenerational_Justice_OECD.pdf)

About the author:

Pieter Vanhuysse, PhD (*LSE*) is Head of Research and Deputy Director at the European Centre for Social Welfare Policy and Research in Vienna (affiliated with the UN). His research focuses on the comparative politics and political sociology of welfare states, public policies, intergenerational policy conflict, and population aging. Pieter has published more than forty journal articles, has co-edited *Post-Communist Welfare Pathways* (Palgrave Macmillan, 2009) and *Ageing Populations in Post-Industrial Democracies* (Routledge/ECPR, 2012), and has authored *Divide and Pacify: Strategic Social Policies and Political Protests in Post-Communist Democracies* (CEU Press, 2006), which was nominated for the American Sociological Association's Best Book Award for Political Sociology.

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