

Introduction

Intergenerational relations: a South African research agenda

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Guest editor of the special issue

Intergenerational relations is not a new focus area of study in Southern Africa. Trends in changing relationships between age cohorts have been traced in family, migration and urbanization studies. This special issue of the *Southern African Journal of Gerontology* presents a case for studying intergenerational relations from a gerontological perspective. The issue includes work from leading international gerontologists and experts in the field of intergenerational relations writing on the United States. Two further contributions come from other parts of Africa – Ghana and Kenya. The articles on intergenerational relations in South Africa, tellingly, come from outside the field of gerontology, a point to be picked up below.

Articles in this issue

It is fitting that this special issue starts with an article by **Vern Bengtson** and **Tonya Parrott**. Bengtson and his colleagues at the Andrus Gerontology Center at the University of Southern California pioneered much of the work currently being undertaken in intergenerational relations. The 1970s generation gap provided the impetus for launching the University of Southern California Longitudinal Study of Generations which attracted many researchers to the field of study. In their article Bengtson and Parrott discuss five specific issues which are central to current US debate about intergenerational equity. Targets for intergenerational equity conflicts are costly programmes which purportedly benefit older age groups at the expense of younger ones. However debate ignores or trivializes exchanges at the family and community levels. The authors draw on data from two large sample surveys, including the Southern California Longitudinal Study of Generations, to illustrate popular viewpoints. The conclusion contains advice to Southern African gerontologists based on lessons learnt by their US counterparts from the intergenerational justice conflicts.

Alice Rossi reports on a large-scale study of the parent-child relationship across the life course undertaken with Peter Rossi using a Boston probability sample. In her article Rossi further develops the social policy implications of findings relating to gender differences. The study found that normative obligations to kin were highly structured although persons might not be aware of the "grammar" of such moral ties. A

unique method of studying normative obligations to kin – the vignette technique – was a special feature of the study. A striking symmetry emerged in the results of the vignette analysis according to kin relatedness. Women described in the vignettes consistently evoked more obligation than male kin and female respondents also perceived greater obligation towards kin. Thus, the female-female bond predominated in being associated with elevated obligation levels. Rossi concludes that women have a powerful role to play in ensuring that intergenerational ties are not broken.

Nana Araba Apt and **Saija Katila** report intergenerational support systems in Ghana, with special reference to women traders, which provide lessons to be learnt by African gerontologists. The authors urge colleagues to seek African solutions to the problems associated with population ageing on their continent. In Ghana some of the energies and resources of family and community were lost in the course of urbanization and these need to be revitalized. The authors draw on case-study material to illustrate three typical indigenous support systems operating among women traders in Accra which build an active role for ageing women. These practices include gifting of the mother's business to a daughter in expectation of care in old age, the leasing of space in the domestic home, and foster and child-care services to secure income and social support after retiring from the market-place. Similar practices may exist in other areas of Africa and need to be documented so that they may be incorporated in local social welfare policy formation.

Maria Cattell describes intergenerational relationships among the Samia of rural Western Kenya drawing on a variety of sources including long-term anthropological research. The paper describes the manner in which intergenerational relationships provide a stable basis for daily life, and a sense of social and cultural continuity in a rapidly changing environment. Cattell outlines the principles, images and ideals which undergird family relations in daily life. Rich insights into the intergenerational contracts woven into daily life are also gained from an analysis of contexts and patterns of social interaction between the generations, the identification of the typical persons who become associates, helpers and confidants of the older generation, an examination of the topics and

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times of natural conversations between generations, and case studies of family decision making.

Catherine Campbell's article gives rare insights into the many facets of intergenerational conflict among working-class urban Africans. Drawing on depth-interview materials, she explores the changing notion of respect between the generations. Respect is a central aspect of traditional African social relationships which prescribes deference towards elders who in turn act as "social guides" for the younger generation. The article examines the different viewpoints of older and younger generations concerning loss of respect for elders, declining competence of elders to guide youth, and loss of power and status of fathers. Campbell's research found that female elders were less likely than their male counterparts to experience the growing independence of youth and the declining authority of elders. Although Campbell cites generation conflict as a key feature of township life, she interprets changing power relations and notions of respect as evidence of the transformation rather than the breakdown of the township family.

David Everatt and **Mark Orkin** report on select findings from a national probability sample of South African youth which have relevance for intergenerational relations. Their study of youth fulfils a similar purpose to the multidimensional study of South African elderly (Ferreira, Møller, Prinsloo & Gillis, 1992); both studies collected baseline data on special age cohorts whose situation had never been documented. Everatt and Orkin review survey findings on the family and parenting circumstances in which South African youth grow up. With a view to possibly overturning some of the popular myths of the generation gap, their survey covered viewpoints on aspects of intergenerational relations and family solidarity, including moral obligations to kin, the value gap between generations, and the authority of elders. Results showed that most youth, African youth in particular, endorsed the concept of the extended family. Childhood circumstances, i.e. whether youths had grown up in the care of parents, grandparents, or other relatives, were associated with some of these viewpoints, including the acceptance or rejection of family values. The study found a trend for grandmothers to share the burden of child care with their adult daughters, particularly in rural areas. Results suggested that grandmothers performed almost on a par with mothers, who were sole caregivers, in transmitting values of family solidarity.

The following sections discuss the manner in which South African work in the field of intergenerational relations compares to and differs from research carried out elsewhere. The possible reasons for similarities and differences are explored. A tentative research agenda for future studies of intergenerational relations in South Africa is drawn up based on ideas gleaned from articles in this issue.

South African three-generation family studies

Changing intergenerational relations have typically been studied in the context of three-generation families. To date, cross-cultural applications of the construct of family solidarity – "the engine driving the pursuit of the common good within families" (Roberts, Richards & Bengtson, 1991:12), developed by Bengtson and colleagues (Mangen, Bengtson & Landry, 1988), has been limited to a South African study of three-generation family households in African townships in metropolitan areas. Other work by Mantzaris (1994) is under way among Indian families in the Durban area.

Møller's (1994a) study of 300 urban African families carried out in 1992 confirmed many of the trends found in the US three-generation family study conducted in conjunction with the National Survey of Black Americans (Taylor, Chat-

ters & Jackson, 1993). It was generally found that family life was satisfactory and that the grandparent and parent generations interacted more frequently with other family members than the child generation. The role of the middle generation was pivotal in linking the grandparent and grandchild generations. In the South African case of poor relationships existing between the top and middle generation, grandparents and grandchildren were closer. The South African study also evidenced a high proportion of women in three-generation households similar to the US study (the latter explained the pattern of early grandmotherhood as a result of two generations of teenage pregnancy). Educational advantage was one of the few generational effects found in the South African study and it appeared to be transmitted through the female line. Youth whose mothers and grandmothers had attained above-average educational levels had the advantage of attending better than average township schools. Although most respondents indicated that family relations were good, very few activities were shared by three generations. Time-use diaries completed by members of the three generations indicated that watching television in the evenings was a possible exception. In contrast to rural Kenya where Cattell reports conversation and story-telling as family binding activities among the Samia, watching television was one of the major joint family activities in South African township families as it is in many developed countries around the world. However the South African grandmother was still the dominant storyteller in the family, possibly a leftover from the days when the African oral tradition featured prominently in everyday life (Møller, 1994b).

Legacies of the past: the youth bias in South African studies of intergenerational relations

Although the South African study of three-generation families found many commonalities with those undertaken among US black families, there are distinctive differences. A leading South African social scientist, Ramphele (1992), reminds us that the key feature which distinguishes black communities in South Africa from those in the United States is that the affected community is the majority. In her view, the causes of social disintegration – which for present purposes will include the mutual alienation between the youth and the older generations – are manifold and include historical, economic, and human resources factors. Ramphele (1992:17) notes that "the Sharpeville massacre of 1960 marked the end of an era in black politics in which young people were beholden to adult leadership." The campaign to make the townships ungovernable during the 1980s gave youth immense power and a driving purpose (Kane-Berman, 1993). With the advent of democracy following the first all-franchise elections of April 1994, the youth require alternative goals and role models appropriate to the new era. The need for a re-orientation of youth is a distinct focus of intergenerational studies in South Africa at the level of the family and society.

Elsewhere studies of intergenerational relations have usually examined exchanges between two generations and three generations. The life-course perspective adopted in the work of Rossi and Rossi (1990) reported in this issue brings a more dynamic approach to the study of generation interactions. Regardless of whether two or three generations are involved, it is the top generation which is the focal interest in these studies. To date, South African intergenerational studies have tended to focus on the youth and work up the generations. This may not be altogether satisfactory from a gerontological perspective. However, given the current demographic structure of South African society and the per-

ceived need to re-orient the youth, this approach may be an appropriate beginning. Further, youth-centred intergenerational studies may have the benefit of attracting social researchers from other disciplines to the field. Given the current shortage of gerontologists in Southern Africa, much of the work to be covered in intergenerational relations may have to be done by social scientists whose primary interests may rest with those of the younger or middle generations.

The legacy of the past is manifest in the South African contributions to this issue which bear the indelible mark of period effects. Campbell's pre-1990 cameo study of black working-class youth and elders shows up facets of the mutual alienation between the younger and the older generation, which are rooted in the past, while Everatt and Orkin's post-1990 nationwide survey of South African youth points to the resilience of family ideals in spite of the forces which effectively undermined the strength of South African family ties.

Towards a research agenda for the future

Replication

Given the dearth of local research on intergenerational relations, there will be merit in replicating many of the studies undertaken elsewhere with appropriate adaptations to allow for local conditions. For example, the replication of the vignette study, undertaken as a central part of the Boston inquiry into family bonds reported by Rossi in this issue, might produce interesting insights into the strength of South African family ties in the transition period. Very little systematic research has been undertaken to date to map the variety and intensity of intergenerational transfers in South Africa. Vignette research on moral obligations might shed more light on changing views of filial piety under differing externalities. It is generally thought that the ideal of filial piety is upheld by the younger generation in the black community (cf. also Everatt & Orkin in this issue). The baseline study of South African elderly (Ferreira *et al*, 1992) suggests that financial transfers benefit the older generation in the case of black South Africans and the younger generation in the case of white South Africans – patterns which conform to the Caldwell (1982) thesis of wealth flows. However very little is known about how the state old-age pensions earned by the majority of black elderly figure in the mutual exchange arrangements in the course of a life time. By the same token we do not know the implications for family bonds of a social welfare policy which would seek to withdraw the right to a state old-age pension.

Greater depth and precision in family research

The critical importance of the family as a central institution and kinship as a social security network warrants further study of intergenerational relations in the family setting. The majority of intergenerational research at the level of the family has focussed on interaction patterns and informal helping behaviours, while qualitative aspects of intergenerational relations have been neglected generally. Campbell's study of working-class life emphasizes the importance of respect issues in connection with knowledge transfers (cf. also Cattell on respect as a cultural ideal in Samia family life). Bengtson's earlier work on the developmental stake (cf. Bengtson, Burton & Mangen, 1985), which addresses generational differences in affective perceptions of family relationships, may provide direction for Southern African researchers wanting to tackle this aspect of intergenerational relations.

There is a need for greater precision in South African research on intergenerational relations (a lesson to be learnt

from Cattell's research in Western Kenya). The three-generation household studies conducted among black and Indian families did not trace blood lines. The majority of multigeneration families in South Africa will consist of sons and their wives living with their parents (cf. Bester, 1994), although black females are increasingly forming households on their own according to recent observations. Affectional ties between the generations may be very different if we are dealing with blood or marriage ties. In Africa there may be less evidence of extreme repression of the daughter-in-law in the interests of filial piety and veneration of the aged than, for example, in Chinese peasant society (Gallin, 1986). However anthropological work suggests that African mother and daughter-in-law relationships tend to be more strained than ones between other dyads. Future research will need to make careful distinctions between agnatic and affinal relations.

A further related research direction concerning role obligations of blood and other kin is suggested by US findings (Taylor *et al*, 1993; Walls & Zarit, 1991). In black three-generation families adult children acted as conduits to establish and sustain informal support networks of elderly persons. In the South African case we do not know if this conduit role is assigned to daughters, daughters-in-law, the social worker in the community, or if it is not filled at all.

Greater precision is also required in terms of defining the generations (cf. also the discussion of conceptual confusions between generations and age groups in Bengtson & Parrott's article in this issue. Also in this issue Cattell demonstrates practical problems of incongruence between age and generation for respect behaviour). Studies elsewhere which used family lineage as opposed to age status as a basis for determining generation position revealed substantial age overlap in generational categories. By this reasoning the older generation referred to in papers by Campbell, and Everatt and Orkin in this issue, are as likely to be grandparents as parents.

Further systematic research might be directed to disentangling the relationship between intra- and extra-family relationships between the generations. This might call for a conceptual distinction to be made between intergenerational relations occurring within and outside the family. The youth-oriented research in this issue suggests in-depth research is required to identify appropriate adult mentors for South African youth. Various constellations of intergenerational relations may obtain according to the particular institutional affiliation of elders: relations with elders in one's own family may be cordial while attitudes to adult leaders in general may be strained. Conversely, it is possible that youth from families characterized by poor family solidarity who come under the tutelage of charismatic external role models may develop a high regard for elders and subscribe to filial piety.

Education, gender and surrogate parenting

The effect of modern education on changing intergenerational relations is a recurrent theme in several articles in this issue. Both Cattell and Campbell describe the handicap of limited education on the part of the older generation in generating positive intergenerational exchanges. This is a world-wide problem, but it is felt very intensely in rapidly developing countries. Bantu education policy, in addition to its many shortcomings, may only have succeeded in widening the generation gap in the South African case. Future research might be usefully directed to examining the educational needs of the different generations and programmes to meet these needs.

To date, South Africans have been more concerned about extending privileges enjoyed by the ruling minority to other sectors of the population. With universal franchise and trans-

parent government it is envisaged that public debate may shift from an exclusive focus on racial divides to intergenerational equity, a point amplified by Bengtson and Parrott at the outset. In other contributions to this issue, Rossi, Cattell, and Apt and Katila raise the issue of gender as an important dimension of intergenerational relations and generational equity (cf. also Adamchak, Wilson, Nyanguru & Hampson (1991) for gender aspects of intergenerational transfers in Zimbabwe). The Rossi and Rossi (1990) vignette study showed that families tended to extend special support to vulnerable persons, who were more likely to be females. This pattern may hold in African families. Apt and Katila argue that most older African women tend to be in a vulnerable position in African society which is male-dominated, therefore a gendered perspective of provision for old age becomes vitally important. Cattell (1992) points out that many more African women are opting for modern solutions to protect their interests in old age. However these pioneers need support for their innovative behaviour. In South Africa there is a new concern that equity issues should also address gender. An appropriate task for gerontologists might therefore be to evaluate the impact of efforts to redress the inequalities of the past on social security benefits accruing to older women.

A further topic for future research refers to surrogate parenthood. Changing relationships between the generations have been attributed to changing demographics and mores. A general trend in developed countries is for adults to spend more years of their lives as grandparents. Trends such as higher divorce rates, single parenthood and adolescent parenthood have generally resulted in a more active family role for grandparents. In the US three-generation studies it was found that black grandparents took a more active role in parenting grandchildren than their white counterparts and were more likely to participate in the administration of discipline (Taylor *et al.*, 1993). In Africa child care is often in the hands of elderly women (cf. Tout, 1994, Apt & Katila and Everatt & Orkin in this issue, and Burman's current work on older coloured caregivers in the Western Cape). The research on Ghanaian traders by Apt and Katila demonstrates that theoretically child care can secure benefits for both generations. The findings of the South African youth study by Everatt and Orkin suggest that surrogate parenthood might pose peculiar problems in shaping future intergenerational relations. Burman's (1994) work on older coloured caregivers also raises questions of cost-shifting and similar policy issues. According to the baseline study of the South African elderly (Ferreira *et al.*, 1992:106; Møller, 1993:15) an estimated 16% of rural and 9% of urban black elders live in skip-generation households. The rapid spread of the AIDS disease in Africa may increase the number of skip-generation households in which older women will play the role of surrogate parents. Further theoretical and practical research is required to prepare the older generations to take up the challenge of surrogate parenting and grandparenting under changing circumstances.

Broader societal issues in intergenerational relations

At this juncture in South African history, intergenerational research must be extended beyond the family to the national arena. In their article Bengtson and Parrott deal with macro-level intergenerational relations and their policy implications which are particularly pertinent to the current debate on the reconstruction and development of South Africa. Public concern in South Africa is currently concentrated on the question of how to expend limited state funds to achieve the greatest common good.

Benefits to elderly people constitute by far the largest portion of all social security spending paid out of general revenue. Of the R12 billion allocated for welfare in the 1994/95 fiscal year, 86% will go to grants, mainly social pensions, leaving little for other needs to be met from the same budget. The non-contributory state old-age pension may be unique in Africa and is a legacy of the past, although parity in the amounts paid out to black and white elders was only achieved in 1993. The recent introduction of free health care for pregnant women and children under six, and school feeding schemes and free schooling for up to nine years – still to be introduced – are examples of new benefits targeting the younger generations. To our knowledge public opinion polls to date have not assessed popular views on the fairness of state expenditures in terms of older and younger target groups. The introduction of new benefits which compete with "old" state expenditure might be a good time to test general views on the optimal mix of benefits accruing to the generations.

Of direct import to the generational equity debate is whether the existing state old-age pension system should be continued or phased out and replaced with a contributory pension scheme. One viewpoint is that the present pension payout system operates fairly efficiently to redistribute wealth. As a large proportion of South Africans elders live with their children and grandchildren, government transfers to the elderly should theoretically benefit entire families rather than individuals. Recent studies have confirmed that pensions add value to the incomes of larger households. Research by Ardington and Lund (1994) in KwaZulu/Natal province shows that income from old-age pensions reaches many of the poorest South African households and improves their standard of living.

Information on the degree to which state transfers support or undermine family networks of mutual assistance is vital for social welfare policy formation. At the family level, the study of intergenerational relationships typically looks at interaction and activity patterns, value consensus, affectional ties and support transactions. Gerontologists study these exchanges with a view to predicting levels of security for future generations: it is feared that strained intergenerational relations might translate into the breakdown of filial piety. Further micro-level research is needed to evaluate the role that pension income plays in intra-household financial transfers and other aspects of intergenerational exchanges including affection, assistance, filial piety and respect for the aged, as well as the self-worth of the elderly.

Apt and Katila make a strong plea to weigh the benefits of introducing new policy without due regard for workable solutions embedded in the old order. Their research highlights the wisdom of Ghanaian women who invest in the younger generation in order to secure their old age. The informal exchange practices described by Apt and Katila are facets of the mutual family support system which is the hallmark of African intergenerational relations. A future task for Southern African gerontologists will be to document the corresponding local practices so that they can be taken into consideration in the formulation of appropriate social welfare policy.

In this issue Bengtson and Parrott refer to the crucial role of media images in disseminating intergenerational messages. This is an area which is under-researched in Southern Africa. Media research to foster positive intergenerational relations offers exciting prospects. Apparent is the need for the media to make greater distinctions between the situation of the oldest-old and the young-old. South African pensioners and retired persons tend to be depicted as benign but impotent without regard to further distinctions between age cohorts and status of health. This image is incongruent with the popular

campaign to empower all sectors of the population including older persons. Similarly, many misconceptions of the burden which the elderly make on society are perpetuated through the media. Lawton (1992) cites housing as an excellent example of how benefits putatively allocated to older people in fact more often than not subsume family members of all ages. In South Africa, a similar claim might be made for the state non-contributory pension which boosts family as well as individual income.

Intergenerational programmes for Africa

In Western countries, where the majority of the elderly live away from their children, intergenerational programmes are seen as a means to compensate for regular contact in the home. From an African perspective, some would question the need for intergenerational programmes given the extended family system. In South Africa, it is envisaged that intergenerational programmes will serve a different purpose from the ones they meet in Western society. South Africa's reconstruction and development will require a concerted effort by people of all ages. It is hoped that intergenerational programmes will produce the energy to tackle some of the urgent tasks lying ahead. Whereas intergenerational programmes in First World countries tend of necessity to rely on the initiative of a single enthusiastic individual and informal support (Angelis, 1992), intergenerational programmes launched as part of the South African reconstruction and development programme can count on much broader formal state and community support. An integrated approach to development envisages programmes with multiple objectives and multiple target groups, including members of different generations. Public works programmes coupled with a youth service corps and educare programmes run in conjunction with other social services are practical examples of intergenerational bridging programmes which simultaneously address the training and empowerment needs of the elderly and youth. Ideally, such programmes would provide employment and infrastructure benefits to the entire community (cf. HSRC, 1994; Budlender, 1994:129). A task for gerontologists, probably as members of a multidisciplinary team, would be to evaluate the mutual benefits to young and old deriving from intergenerational programmes of this nature.

An open intergenerational relations research agenda

The task of researching intergenerational relations in Southern Africa has hardly begun. The work brought together in this issue suggest a wealth of research ideas still to be explored. The above list of research tasks does not presume to be exhaustive. It is merely an attempt to outline the numerous possibilities which are open to South African researchers willing to take up the challenge. It is hoped that prospective researchers in South and Southern Africa will learn from and become inspired by the authors writing in this issue. Readers are encouraged to participate in basic and applied research in intergenerational relations which could contribute to harmony between people of all ages.

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