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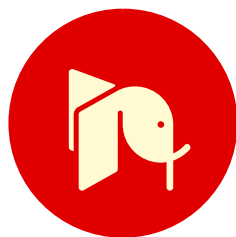
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Intergenerational Solidarity in the Nordic and Baltic Regions

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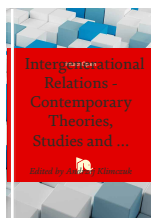
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Intergenerational Relations - Contemporary Theories, Studies and Policies [Working Title]

Ph.D. Andrzej Klimczuk

Abstract

Intergenerational solidarity in the Baltic states and Nordic countries has gained heightened significance, catalyzed by the COVID-19 pandemic. This research delves into the evolving dynamics of mutual support, care, and respect across generations, emphasizing the role of family values, sociocultural context, and economic factors. Amid global health challenges, intergenerational cooperation emerged as essential with older individuals' vulnerabilities underscoring the need for assistance and support from younger generations. By analyzing responses from these

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regions, the study explores functional and economic exchange, while considering cultural values and historical influences. The pandemic's impact on assistance patterns and the interplay between COVID-19 restrictions in Baltic and Nordic countries are examined. Ultimately, this research sheds light on the intricate fabric of intergenerational relationships, offering insights into maintaining societal resilience and cohesion during transformative times.

Keywords

functional support and assistance exchange

financial support

resource transfer

older adults

values

COVID-19



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1. Introduction

1.1 Intergenerational solidarity in the Nordic and Baltic regions

Investigating intergenerational solidarity in the Baltic states and Nordic countries is of significant importance as the proportion of the older population in these regions continues to rise. This research offers crucial insights into society's perceptions of older adults, whether viewed as potential burdens due to reduced labor market capacities or as valuable fountains of knowledge and experience.

Understanding these perceptions is key to addressing potential social exclusion among the older population and promoting more inclusive viewpoints.

Moreover, within the Nordic systems of care, respect and value for the older generation are foundational. The strong emphasis on respecting the contributions and experiences of older adults is deeply ingrained in these societies, and this cultural value plays a pivotal role in intergenerational relationships. Old age is often linked to weakness and a need for support from family members and society.

Analyzing intergenerational solidarity is essential for fostering respectful relationships across generations and recognizing the strengths and assets of both younger and older individuals. Successful intergenerational solidarity contributes to cohesive societies, emphasizing family values and mutual care, which in turn enhances the well-being of all age groups.

The sociocultural context in the Baltic states and Nordic countries is intricate and plays a pivotal role in shaping intergenerational relationships and family values. By delving into financial factors such as resource availability and family income, policymakers can develop targeted interventions to support families in need. Understanding the impact of political aspects, including social policies and citizens' rights, aids in constructing robust support systems spanning generations.

Furthermore, considering historical events and cultural traditions provides a comprehensive understanding of the unique dynamics within these societies. This facilitates identifying shared values that strengthen family bonds and promote intergenerational solidarity.

The emergence of the COVID-19 pandemic has significantly influenced the functional exchange of assistance and help within the Baltic states and Nordic countries. The impact of COVID-19 restrictions varied between these regions, reflecting differences in their responses to the pandemic. In the Nordic countries, known for their well-established social welfare systems, the pandemic prompted a re-evaluation of their support structures. The importance of intergenerational solidarity was reaffirmed, and efforts were made to ensure that older individuals received the care and assistance they needed while adhering to safety measures.

In the Baltic states, the impact of COVID-19 restrictions shed light on the resilience of family networks. With fewer resources and support mechanisms in place, families relied even more heavily on intergenerational solidarity to navigate the challenges posed by the pandemic. The restrictions underscored the significance of mutual support between generations, highlighting the crucial role of family networks in times of crisis.

In both the Nordic countries and Baltic states, mutual functional and financial exchanges between generations play a significant role in sustaining family networks. The support systems encompass various forms of assistance, including caregiving, financial contributions, and the sharing of practical skills. These exchanges are deeply ingrained in the fabric of society, contributing to cohesive family structures and enhancing the overall well-being of all generations.

In conclusion, exploring intergenerational solidarity, values, understanding, respect, and the sociocultural context in the Baltic states and Nordic countries yields invaluable insights that guide policymakers and researchers towards cultivating inclusive societies. This ensures the well-being and dignity all age groups while fostering strong family connections that contribute to overall social cohesion



and unity within these regions, especially during times of crisis such as the COVID-19 pandemic.

The aim of this study is to investigate the functional and financial assistance/support exchanged across generations, as well as the underlying cultural, historical, and sociopsychological values that shape these interactions among the older populations in the Nordic and Baltic countries. Additionally, the study seeks to explore the potential impact of the COVID-19 pandemic and related restrictions on intergenerational support systems within these regions. By examining these aspects, the research aims to provide valuable insights into the dynamics of intergenerational relationships and the factors that contribute to the well-being and cohesion of older individuals in the studied countries.

We hypothesize that intergenerational support systems in the Nordic and Baltic countries are influenced by cultural, historical, and sociopsychological factors. We also expect the COVID-19 pandemic to impact these systems differently across countries.

By implementing a multifaceted research methodology that combines diverse datasets and employs statistical analysis including Pearson's chi-square test and binary logistic regression with adjusted odds ratios, we have successfully obtained valuable insights into the intricate dynamics of intergenerational support systems within the Nordic and Baltic countries. These findings shed light on the multifarious influences of cultural, historical, and sociopsychological factors on these systems, as well as the differential impact of the COVID-19 pandemic across these distinct regions.

While the examination of prior research findings has enhanced our understanding of intergenerational solidarity within the Baltic and Nordic regions, it is crucial to acknowledge certain limitations. Notably, constraints pertaining to various confounding factors, such as socioeconomic, cultural, and health-related variables, were beyond our control due to data availability constraints. To mitigate potential bias stemming from these limitations, we have adopted a comprehensive approach, synthesizing information from diverse studies and data sources and incorporating current and pertinent literature.



1.2 Intergenerational solidarity in the family and challenges posed by COVID-19 pandemic

Intergenerational solidarity in the family refers to the mutual support, care, and connection between different generations within the family context. It involves expressing willingness to help each other in various aspects of life, including financial and emotional support, caregiving, and daily assistance []. The concept of intergenerational solidarity has gained even greater significance in the context of the COVID-19 pandemic. The unprecedented challenges posed by the pandemic have underscored the importance of mutual support and cooperation between different age groups within families and communities. The global health crisis has brought to light the vulnerabilities faced by older populations, making the exchange of assistance and support among generations more crucial than ever before.

The COVID-19 pandemic has illuminated the essential role that intergenerational solidarity plays in maintaining the well-being and resilience of societies. As communities grappled with lockdowns, social distancing measures, and disruptions to daily life, the interconnectedness between generations became evident. Older individuals, particularly those more susceptible to the virus, required support for their health and safety, while younger generations stepped up to provide essential assistance, such as grocery shopping, medication delivery, and emotional companionship.

In this study, we utilized the latest available data to delve into the dynamics of intergenerational solidarity during the COVID-19 pandemic. By analyzing the responses of individuals from the Nordic and Baltic countries, we aim to shed light on how this crisis has impacted the exchange of functional and financial assistance/support across generations. Additionally, we seek to understand how cultural, historical, and societal values have shaped these interactions and the extent to which the pandemic has influenced the pre-existing patterns of intergenerational relationships.

By exploring these aspects, we hope to gain insight into the evolving nature of intergenerational solidarity in the face of a global crisis. Ultimately, our research contributes to a better understanding of the



role that different generations play in supporting one another and highlights the resilience and adaptability of societies during challenging times.

1.3 Geographical impact and migration

Understanding intergenerational solidarity requires considering the influence of cultural and social contexts. Dykstra and Fokkema [] introduce a nuanced approach to exploring family relationships, revealing that geographical proximity and strong family norms influence assistance-sharing during, e.g., childbirth, but not necessarily financial support exchange. Moreover, the study emphasizes the importance of considering intergenerational relationship variability in different countries. It also demonstrates that family relationship types can evolve over time and across family members' life paths. For example, another study indicates that Lithuanians with family members living abroad show a slightly lower willingness to support their parents and have a slightly higher concern about future caregiving responsibilities compared to the general population []. Additionally, this group displays a slightly weaker agreement regarding the responsibility of adult children to care for their aging parents. Migration experiences appear to influence attitudes towards filial obligations and the readiness of adult children to support their parents. Family ties' structure and geography play a significant role in determining the ability to provide mutual assistance. Both the general population and families with migration experience tend to reside relatively close to each other, which may result in more intense support exchanges in the event of future parental care needs. Regarding intergenerational solidarity types, the analysis reveals a high potential for support among family members, with the detached relationship type being less prevalent. The predominant types of intergenerational solidarity emphasize the maintenance of close ties, both within the general population and among families with migration experience.

In conclusion, studying intergenerational relationships in different countries, including Eastern European nations, can help to better understand the similarities and differences in family solidarity in life. Embracing diverse perspectives and acknowledging variability is essential in fostering successful intergenerational solidarity in the Nordic



and Baltic regions.

2. Discussion of the results

2.1 Dimensions of caregiving in the Baltic states and Nordic countries

To study intergenerational solidarity in the Baltic states, a sample of 10,123 respondents aged 50 years and above was drawn from the Survey of Health, Ageing and Retirement in Europe (SHARE) Wave 9, COVID-19 Survey 2 []. The sample included participants from Latvia (962), Estonia (4046), and Lithuania (1251). Additionally, a sample was taken from three Nordic countries: Denmark (1589), Sweden (969), and Finland (1306). The analysis of age distribution revealed noteworthy differences among the countries. All countries in the sample had a higher proportion of respondents aged 70 years and older, with a significantly higher proportion in Sweden and Estonia ($p < 0.001$, Cramer's $V = 0.125$). This suggests that the older population was relatively larger in these two countries.

Furthermore, the study also explored gender distribution in the sample. The Nordic countries (Denmark, Sweden, and Finland) exhibited a slightly larger proportion of male respondents in comparison to the Baltic states (Latvia, Estonia, and Lithuania) ($p < 0.001$, Cramer's $V = 0.076$).

The analysis covered aspects related to both the delivery and receipt of personal and home care throughout the COVID-19 outbreak. The results of this analysis are outlined in - and 1- . This examination involved the scrutiny of valid responses regarding assistance provided to and received from various groups, such as one's own children, parents, other relatives, neighbors, friends, and colleagues outside the household during the COVID-19 outbreak []. The total surpasses 100% due to respondents being able to select more than one option.

	N	Percent of



		cases
Own children outside home since outbreak	153	24
Own parents outside home since outbreak	266	42
Other relatives outside home since outbreak	163	26
Neighbors/friends/colleagues outside home since outbreak	156	25

Table 1.

Personal care provided in the Baltic states and Nordic countries across the entire sample during COVID-19 to different recipients.

	N	Percent of cases
Own children to obtain necessities <i>since</i> outbreak	2506	83
Own parents to obtain necessities since outbreak	33	1
Other relatives to obtain necessities since outbreak	406	13
Neighbors/friends/colleagues to obtain necessities since outbreak	729	24

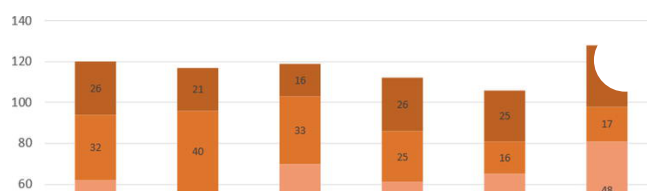
Table 2.

Help received to obtain necessities in the Baltic states and Nordic countries across the entire sample during COVID-19 from different caregivers.

	N	Percent of cases
Own children	197	42
Own parents	2	0.4
Other relatives	55	12
Neighbors/friends/colleagues	86	18
Professional care providers	280	59

Table 3.

Regular home care received totally during the last 3 months across the entire sample from different sources.



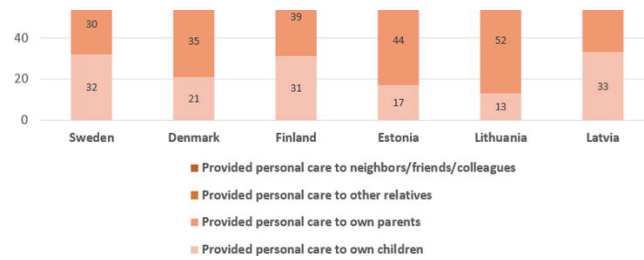


Figure 1.

Personal care provided during COVID-19 (by country) (%).

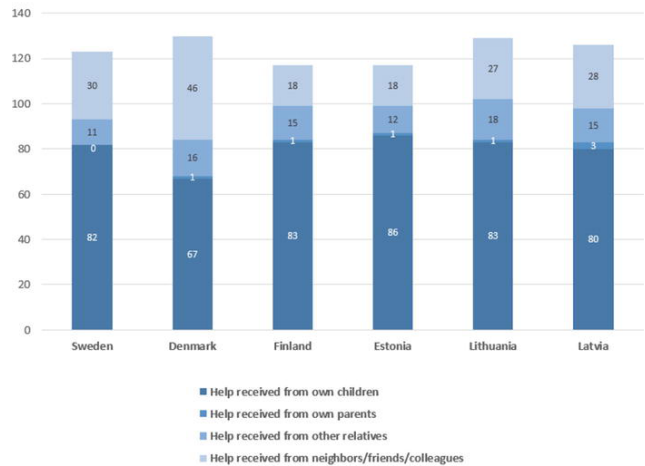


Figure 2.

Help received to obtain necessities during COVID-19 (by country and by source) (%).

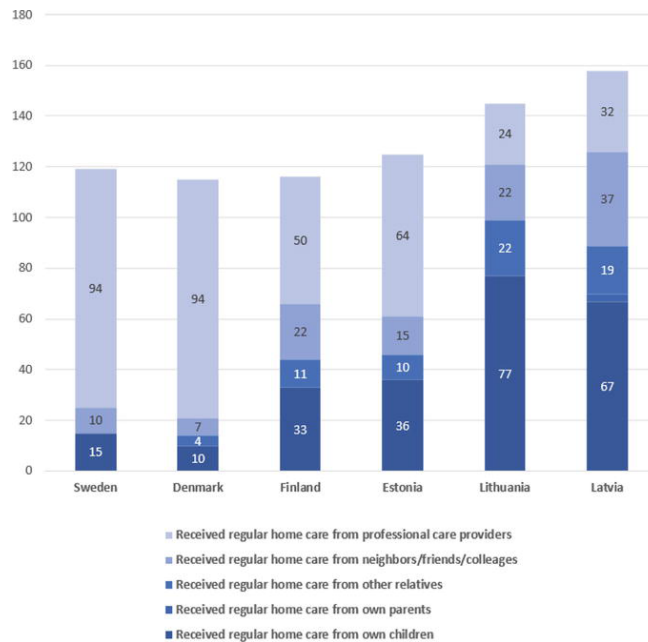


Figure 3.

Regular home care received during the last 3 months (by country and by source) (%).

The provision of personal care during the COVID-19 pandemic was investigated in both the Baltic states and Nordic countries, considering the entire sample.



Only 634 valid cases were available. A total of 738 responses were received.

Respondents often reported receiving support from various sources, including their own children, parents, other relatives, neighbors, friends, and colleagues outside the household. The highest proportion of personal care provided outside the home since the outbreak of the pandemic was directed towards one's own parents, with a notable rate of 42%.

Exploring the results among all countries, Nordic countries reported providing care more often to other relatives compared to Baltic states. A smaller proportion of respondents in Estonia and Lithuania reported providing personal care for their own children ().

This examination involved the scrutiny of 3674 responses regarding assistance provided to various groups during the COVID-19 outbreak. During the COVID-19 pandemic, the exchange of assistance for obtaining necessities in the Baltic states and Nordic countries across the entire sample revealed that the most substantial proportion, at 83%, was from own children. This underscores the significant role that offspring played in providing support for essential needs during this challenging period (). Exploring the results among all countries, Denmark reported less often receiving help from its own children and more often receiving help from neighbors, friends, and colleagues ().

As we navigate the ongoing challenges of the COVID-19 pandemic, understanding the role of intergenerational solidarity in family support becomes essential for devising effective policies and interventions to promote the well-being and resilience of families across generations. The lessons learned from this period can guide future efforts to enhance family relationships and ensure that intergenerational support remains a pillar of strength in times of crisis and beyond. These findings shed light on the demographic characteristics of the sample and the scope of personal care provided during the pandemic, offering valuable insights into the interplay between age, gender, and support networks in the context of the COVID-19 crisis.



The regular home care received during the last 3 months was assessed from multiple sources, including own children, parents, other relatives, neighbors, friends, and colleagues outside the home. In total, only 474 valid cases of regular home care were available. A total of 620 responses were received, indicating that respondents often received home care from multiple sources.

Exploring the results among all countries, the Baltic states reported more often receiving regular home care from their own children. Sweden, Denmark, and Estonia more often reported receiving regular home care from professional care providers ().

2.2 Values and attitudes

The European Values Study data from 2022 [] offers a valuable opportunity to compare the views of residents across European countries, including the Baltic and Nordic regions, regarding aspects of intergenerational solidarity. Specifically, the study explores citizens' perceptions of the individual responsibility of families versus society/the state as a whole in caring for older citizens.

Children's attitudes towards their duty to their parents are influenced by various factors, ranging from the country's level of well-being and the availability of health and social care services to cultural and family traditions and religious beliefs. As well as in some cases, obligations towards the parents and grandparents are stated in the legal regulations.

EVS 2022 data reveals significant differences between the opinions of inhabitants in the Baltic and Nordic countries on this matter, with χ^2 (14, $N = 12,470$) = 1729.65, and $p < 0.001$. In the Baltic states, a majority of individuals (over half) believe that adult children have the duty to provide long-term care for their parents. This perspective is most prevalent in Lithuania (65%), likely due to the strong influence of Catholicism on family relationships and traditions. In Latvia, this attitude is somewhat influenced by economic factors, as the older population faces higher at-risk-of-poverty rates compared to Lithuania, Estonia, and the EU average []. In addition, in the Baltic states, the legal framework also stipulates the obligation of children to support their parents and grandparents, of course,



as well as specifying cases of exception. For example, the Civil Law of the Republic of Latvia, Section 188 states that the duty to maintain parents and, in cases of necessity, also grandparents, lies upon all of the children commensurately to their abilities [15].

Also, the Civil Code of the Republic of Lithuania, Section 3.205 states, that adult children shall be obliged to [maintain → provide financial assistance to] their parents who have lost earning capacity and need support [16]. Obligations stated in the legal framework as well as local court cases have impact on the understanding and opinions of population.

In stark contrast, the Nordic countries present a completely different picture. Only a minority of the population in these countries believe that adult children should be responsible for long-term care for their parents, with the lowest support found in Finland (21%) and Denmark (25%) (Figure 4).

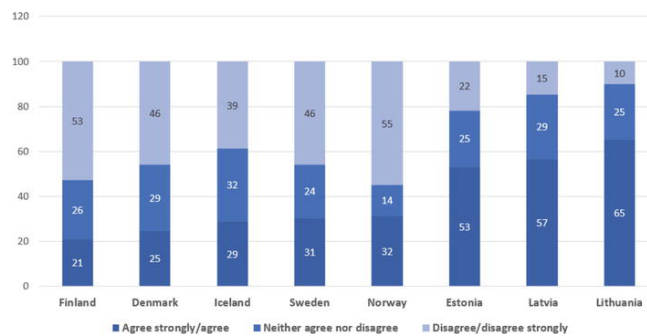


Figure 4.

Adult children have the duty to provide long-term care for their parents (%). Source: The authors, based on EVS survey data, wave 5, (n = 12,470).

These findings highlight the significant variations in intergenerational solidarity perspectives between the Baltic and Nordic regions, shaped by a combination of cultural, economic, and societal factors. Understanding these differences is crucial for developing appropriate policies and support systems for providing care for older adults in each country.

In the Baltic and Nordic regions, where the proportion of older people is increasing, strong intergenerational relationships and support systems within families can have a positive impact on the health and longevity of older individuals. When adult children are actively involved in caring for their parents and providing emotional and financial



support, it can lead to better physical and mental health outcomes for older parents. The availability of family support can alleviate the burden on formal healthcare systems and long-term care facilities, ensuring that older individuals receive the care they need. From 2006 to 2016, the percentage of older people who provided financial assistance to the younger generation went from 62% to 73% in Iceland [], and the share of the family in providing support to older relatives also increased between the 2016 and 2020 surveys during the pandemic [].

In a study conducted by Silverstein and Bengtson [], a positive correlation was found between close parent-child relationships and the reduced risk of death for older parents. The research supported the notion that family values and traditions play a significant role in fostering supportive intergenerational relationships. These values and traditions encompass respect for older generations, providing assistance and support to parents, actively involving them in family life, and caring for them in their old age. As a result, stronger intergenerational ties, stemming from family values and traditions, can contribute to a lower risk of death for older parents. This study underscores the importance of preserving and passing on family values and traditions to promote the well-being and longevity of parents.

However, the effectiveness of family support in promoting longevity is also influenced by the broader context in the Nordic and Baltic countries, e.g., healthcare and long-term care provision. The healthcare systems play a crucial role in providing medical services and long-term care for older people, particularly those with chronic health conditions and age-related dependencies.

Family values and traditions alone may not be sufficient to address the complex health needs of older individuals. Adequate and accessible healthcare services are essential to support older people in maintaining their health and well-being. A well-functioning healthcare system can complement family support and ensure that older individuals receive timely medical interventions, preventive care, and long-term support, contributing to their overall longevity.

In summary, family values and intergenerational



solidarity are vital factors influencing the longevity of older people in the Nordic and Baltic countries. These values foster supportive family relationships, which, when combined with well-developed healthcare systems providing long-term care, contribute to better health outcomes and prolonged lives for older individuals. The interplay between family support and formal healthcare services is crucial in promoting the well-being and longevity of the aging population in these regions.

When examining the overall attitude of Baltic and Nordic societies towards the older generation, a significant difference emerges based on the European Values Study data []. The responses to the question “To what extent do you feel concerned about the living conditions of older people living in your country?” reveal contrasting perspectives between the two regions.

In the Baltic states as a whole, the population demonstrates much less concern for the living conditions of persons 65 years and older compared to the Nordic countries. Estonia exhibits the lowest rates of concern, with only 48% of the population expressing significant concern for the conditions of older people. On the other hand, in Denmark, the majority of the population (81%) is deeply concerned about the living conditions of older individuals, followed closely by Norway (78%) and Sweden (77%).

The empirical findings reveal a strong inclination towards supporting older parents among the Lithuanian population. This support is driven by robust filial norms, a high willingness to assist parents, and a low level of concern about future caregiving needs for older parents. The population widely adheres to the social norm of considering the care of older parents as the responsibility of adult children, regardless of individual or family characteristics.

Gendered patterns are evident in intergenerational solidarity and expectations of support from personal networks. Women within personal networks are perceived as having a greater potential to assist with care for older adults, particularly when they share family ties with the individuals involved. Overall, the research underscores the significance of filial norms



and family dynamics in shaping support for older parents in Lithuania () [].

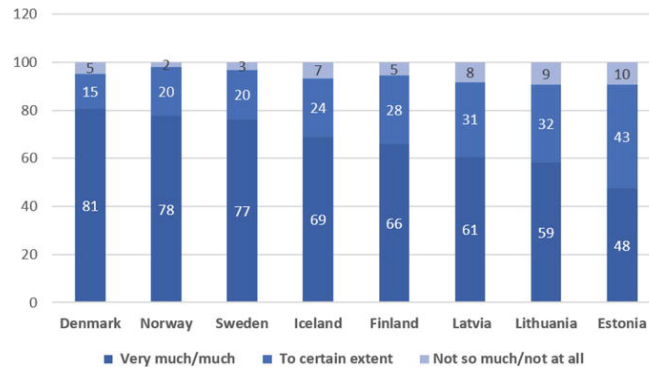


Figure 5.

The extent to which one feels concerned about the living conditions of older people in their country (%). Source: The authors, based on EVS survey data, wave 5, (n = 12,518).

The discrepancy in attitudes towards the older population is reflected in the societal and state treatment of older individuals in the Baltic states since gaining independence. The prevailing sentiment can be described as covertly dismissive or even neglectful. This attitude is evident in several aspects, such as meager pensions, discriminatory behavior from medical and care workers, inadequate infrastructure for older adults, and a preference for hiring younger individuals in the labor market. The Baltic states also experience higher rates of age discrimination compared to the EU average. Among the Baltic countries, age discrimination rates vary, with Lithuania reporting the highest indicator at 45% of respondents recognizing age discrimination, followed by Latvia at 40%. Estonia, on the other hand, demonstrates the lowest prevalence of age discrimination among the Baltic states, with 35% of people reporting it as a widespread form of discrimination [].

Eurobarometer data reveals that age discrimination is not limited to the Baltic countries alone. Interestingly, even in the Nordic countries, where the concern for the living conditions of the older population is comparatively higher, age discrimination is still recognized as a widespread phenomenon by a considerable portion of the population. In Sweden, 42% of the population recognizes age discrimination as a widespread issue, while in Finland, 37% share this sentiment. Age discrimination rates are comparatively lower in Denmark, where only 25% of the population recognizes age discrimination as a



widespread phenomenon.

Exactly, the findings indicating age discrimination as a concern in both the Baltic and Nordic countries underscore the significance of addressing ageism on a broader societal level. Combating age discrimination and promoting inclusive attitudes towards older individuals should be a shared priority for these regions.

To ensure the well-being and dignity of their aging populations, societies in the Baltic and Nordic countries need to take proactive measures to eliminate age discrimination and promote respectful treatment of older individuals. This includes implementing policies that protect the rights of older people, creating age-friendly environments that support active aging, and fostering intergenerational solidarity to bridge the gap between different age groups. Additionally, addressing living conditions and providing better care for older persons should also be given significant attention. This involves improving the availability and quality of healthcare and long-term care services for older individuals, as well as enhancing social support systems to meet their needs. By collectively working towards combating ageism and creating a more inclusive society, the Baltic and Nordic countries can ensure that their aging populations are valued, respected, and able to live with dignity and well-being. These efforts will contribute to a more harmonious and supportive society, benefiting people of all age groups.

2.3 The role of intergenerational solidarity in family relations

The study by Albertini et al. [] provides valuable insights into the intergenerational resource transfer patterns in Western European countries, using data from the SHARE survey conducted in 2004. Their research highlights a common pattern of intergenerational resource transfer, where parents tend to pass on resources to their children more often and more intensively than vice versa. This positive balance in favor of transferring resources to younger generations remains evident even among individuals over 70 years of age, although it decreases with age.

The nature of resource transfer varies depending on



the type of social regime in each country. Southern European countries exhibit less frequent but more intensive transfers of resources, while the Nordic countries demonstrate more frequent but less intensive transfers.

These findings emphasize the importance of considering intergenerational resource transfer in policies and research related to aging and family support. Understanding the dynamics of resource transfer between generations is crucial for formulating effective social policies and support systems that can address the needs of different age groups within families.

By recognizing the patterns of intergenerational resource transfer, policymakers can design targeted interventions to promote more equitable and supportive family relationships. Additionally, these insights can help in creating sustainable welfare systems that facilitate mutual support between generations and ensure the well-being of both older and younger family members.

In conclusion, the study [] sheds light on the significance of intergenerational resource transfer in Western European countries and highlights the need for policies that acknowledge and support these dynamics to foster stronger and more resilient family ties across generations.

2.4 Economic conditions

Economic conditions and the impact of socioeconomic status on the use of care among older adults in different countries []. This paper examines the relationship between socioeconomic status and the use of different types of care provided for older people in Belgium, the United Kingdom, Italy and the Netherlands, and examines sociodemographic and health outcomes related factors influencing this relationship. The authors of the study draw the following conclusions on the basis of this article: people with low socioeconomic status seek more help, both formal and informal, but it varies by type of assistance and country. Factors such as age (75 years and older), health status and marital status (unmarried or widowed) explain some of the differences in the use of formal assistance in all countries and informal care in all countries except



Belgium. This is because sociodemographic characteristics and health status may play a role in determining the need for care. The likelihood of using informal assistance is related to the availability of family members who are willing and able to help, as well as the availability of available funds and resources. This may depend on relationships within the family and the availability of relatives for assistance. Socioeconomic disparities in the use of formal aid remained significant even after accounting for the factors explaining the use of informal assistance. This indicates that differences between countries in the use of formal assistance are not entirely due to socioeconomic status or other characteristics of the population but may be related to the characteristics of the social security system and the level of access to relevant services. All four countries have different social security models that can influence the availability and use of formal assistance. Each country may face unique social and economic challenges that require unique approaches to the organization of the support system for older citizens. Thus, the study highlights the importance of considering socioeconomic and cultural differences in providing care to older persons. The diversity of approaches to care depending on the country and socioeconomic status highlights the need to develop individualized and adapted support programs that consider the specificities of each country and ensure equal access to social services for all citizens. The policy, as expressed in legislation and other policy documents, ensures access of older adults to the appropriate level of health and social care services [15].

Nekehia et al. [16] investigated the links between socioeconomic status and the provision of informal care within the family. The authors of the article also found that people with low levels of education, income and wealth are more likely to provide informal care to older members of their families. The researchers also drew attention to the impact of macro-level factors, such as income inequality and social spending of the country, on the provision of informal care. It turned out that the high level of income inequality in the country is positively associated with the provision of care, while more generous social spending carried out by the state associated with a lower likelihood of providing care to older adults within the family. This analysis makes it clear that socioeconomically vulnerable groups are

more likely to become informal caregivers, which can exacerbate socioeconomic caregivers' economic inequalities in society. At the same time, government measures to reduce income inequality and increase social spending can help reduce the intensity of family care and ease the burden on caregivers.

Using multi-level regression models, the study provided evidence-based conclusions about the relationship between socioeconomic factors and informal care provision in the family. Such analyses are important for identifying target groups in need of special support and developing national strategies to assist family caregivers [].

Biggs et al. [] conducted a study to investigate a new model of intergenerational relationships based on the possibility of placing oneself in the position of a person of a different age, or an “age other” []. In the chapter, the authors consider an experimental approach that combines sociological thinking about “generational consciousness” with a discussion in gerontology about the relationship between conflict, solidarity, and ambiguity. The focus is on the processes of age-related experience, and a distinction is made between information “intelligence”, which is culturally accessible to social actors, and the degree of ability to “act intellectually”. The latter involves steps to be taken in order to become critically self-aware of age as a factor in social relations, including the relative ability to recognize one's personal age uniqueness, an understanding of the intergenerational relationship, a critical awareness of the point of view taken behind age-related positions, and, finally, acting in accordance with age consciousness. The study found that lower socioeconomic resources—education, income, and wealth—are associated with a higher likelihood of providing informal care to older family members. At the macro level, income inequality was positively associated with the provision of informal care, while social spending was negatively associated with it. The findings indicate that socially disadvantaged groups are more likely to provide informal care, which can exacerbate socioeconomic inequalities. At the national level, a more equitable distribution of resources and social spending can reduce intensive family care for older adults. The authors propose consider the possibilities of supporting sustainable intergenerational relationships and pay attention to subsequent research in this area.



The study conducted by Albertini et al. [] offers valuable insights into intergenerational resource transfer patterns in Western European countries based on the 2004 SHARE survey data. The research reveals a common trend where parents tend to pass on resources to their children more frequently and intensely than the other way around. This positive balance of resource transfer to younger generations remains evident even among individuals over 70 years of age, though it diminishes with age.

The nature of resource transfer varies based on the social regime of each country. Southern European countries show less frequent but more intensive transfers, while the Nordic countries demonstrate more frequent but less intensive transfers.

These findings underscore the importance of considering intergenerational resource transfer in aging-related policies and family support research. Understanding the dynamics of resource transfer between generations is crucial for designing effective social policies and support systems that cater to the needs of different age groups within families [,].

By acknowledging the patterns of intergenerational resource transfer, policymakers can create targeted interventions to promote equitable and supportive family relationships. Additionally, these insights can aid in developing sustainable welfare systems that facilitate mutual support between generations and ensure the well-being of both older and younger family members.

In conclusion, Albertini, Kohli, and Vogel's study sheds light on the significance of intergenerational resource transfer in Western European countries and emphasizes the necessity of policies that recognize and support these dynamics to foster stronger and more resilient family ties across generations.

Sociologist Marc Szydlik's research focuses on the connections and interactions between different generations in family relationships and their impact on social stratification []. The study examines five types of connections, including those within the family throughout life, between the family and the state, and between generations and social stratification. Szydlik's [] work also explores the links between individual needs and capabilities,



family relationships, and cultural-contextual structures, while discussing the importance of combining theoretical considerations with empirical research using examples of assistance, care, and inheritance.

The findings confirm the presence of stable intergenerational ties in families, evident through financial transfers and social support. The research highlights the significant impact of family solidarity on social inequality throughout individuals' lives, as well as the relationship between social security regimes and the operation of intergenerational solidarity.

Szydlik [] proposes a theoretical model that elucidates the connections between individual needs and opportunities, family relationships, and cultural-contextual structures. Moreover, the study underscores the importance of integrating theoretical considerations with empirical research in understanding assistance, care, and inheritance.

Overall, the research underscores the role of intergenerational solidarity in family relationships and its influence on social stratification. It emphasizes the need to consider these linkages in developing social policies and supporting family relationships.

The study of Kraniauskienė [] distinguishes between functional solidarity and normative solidarity in the context of family support exchanges. Functional solidarity refers to the actual organization of mutual assistance and support among different generations within a family. Normative solidarity, on the other hand, explores attitudes towards familism or defamilism and how these influence the reciprocation of support between adult children and their parents, as well as expectations regarding the role of the state in supporting families.

The empirical data from the Generation and Gender Program survey indicate that Lithuania has a supportive familism attitude, emphasizing the distribution of various types of support between the family and the state [].

Expectations regarding support vary among different age groups. Familism is evident in the society's



normative orientation towards supporting the youngest generation, particularly in terms of after-school care for preschool and school children. However, financial support for persons 65 years and older is expected to be shared with society or the state.

Regarding functional solidarity, emotional support from parents plays a significant role during key stages of role transformation in life development. Parental emotional support becomes more relevant and important in maintaining the emotional well-being of adult children during these periods. As parents age, the emotional bond with their children and the support they receive from them become more crucial, fostering close emotional relationships.

In terms of material support, parents are more likely to support their children, with parents aged 45–64 being the most active in providing this support. Overall, the study suggests that norms of familism in Lithuania primarily focus on caring for the youngest members of society. Childcare is predominantly supported within the family, with less reliance on state services. However, when it comes to caring for older or disabled parents, there is a clear preference for supported familialism [10].

The Survey of Health, Ageing, and Retirement (SHARE) that is conducted among respondents aged 50+ in 28 European countries includes questions about giving and receiving financial gifts of €250 or more and providing or receiving help from family members or others outside the household in the preceding 12 months. In wave 8 of the survey (October 2019 to March 2020), the widest coverage was achieved, with a total of 27 countries participating, including all three Baltic states and three Nordic countries (Sweden, Denmark, and Finland) [11].

The majority of respondents neither gave nor received any financial gifts, and there were more donors than recipients. The proportion of recipients varied from 2.5% in France to 12.7% in Estonia and Israel, with an average of 7.1% across all participants. The proportion of donors ranged from 7.4% in Latvia to 42.0% in Denmark, with an average of 26.4%.

Interestingly, the share of donators in Nordic

countries was considerably higher compared to most other countries: Sweden (33.9%), Finland (38.8%), and Denmark (42.0%). On the other hand, the shares of donors in the Baltic countries were among the lowest: Estonia (20.7%), Lithuania (16.4%), and Latvia (7.4%).

The proportions of respondents who gave and received non-financial assistance were higher, but the majority still answered negatively to both questions. Although there were more donors than recipients, the difference in proportions was not that large, with an average of 25.5% giving help and 22.5% receiving help from non-household members.

Notably, participants from Nordic countries were more active in providing help to their relatives and friends than any other region, with Denmark having the highest proportion at 50.9%. On the contrary, similarly to financial gifts, Baltic states had the lowest proportions: Estonia at 18.7%, Lithuania at 12.5%, and Latvia at 10.4%.

In terms of receiving help from others, the highest proportion was observed in Czechia at 37.7%, while Malta had the lowest at 9.1%. Among the Nordic countries, Sweden had the highest proportion at 32.5%, while Latvia and Lithuania were below average at 16.0% and 15.8% respectively. Estonia showed a relatively high rate of 29.6%.

It could be argued that lower participation in giving financial gifts in the Baltic states compared to the Nordic countries may be attributed to the lower incomes of the Baltic population. The fixed threshold of €250 for financial gifts across all countries might result in Baltic respondents giving gifts at similar frequencies but in smaller amounts. However, less frequent participation in practical help transactions puts this argument under doubt.

To analyze whether sociodemographic factors influence the likelihood of giving help and financial gifts similarly in both regions, stratified multivariable binary logistic regression models were used. Factors such as person's sex, age, living single or in couple, having children, and household's financial situation were considered. The models were statistically significant (all having $p < 0.001$), but the Nagelkerke R^2 statistics indicated that they explained only a



moderate amount of the outcome.

Despite the limited explanatory power, the models yielded interesting conclusions. The strong reciprocity between receiving and giving support, both tangible and intangible, was evident in the analysis [,]. Overall, the findings shed light on the complex dynamics of intergenerational support in the Nordic and Baltic regions (and).

	Receive financial gifts		Receive practical help	
	Baltic (n = 3533)	Nordic (n = 3429)	Baltic (n = 3537)	Nordic (n = 3430)
Gender (W/M)	1.88 (1.39–2.54)	1.54 (1.17–2.04)	1.34 (1.11–1.62)	1.29 (1.10–1.51)
Single/couple	1.29 (1.01–1.65)	0.99 (0.75–1.33)	1.69 (1.42–2.01)	2.72 (2.13–3.20)
Has child(ren) (yes/no)	2.54 (1.47–4.38)	1.42 (0.82–2.45)	1.14 (0.88–1.48)	1.50 (1.14–1.98)
Able to make ends meet:				
With great difficulty	1	1	1	1
With some difficulty	0.86 (0.60–1.23)	1.01 (0.46–2.21)	0.90 (0.71–1.14)	0.76 (0.48–1.22)
Fairly easy	0.82 (0.57–1.19)	0.82 (0.39–1.74)	0.91 (0.71–1.16)	0.78 (0.50–1.21)
Easily	0.82 (0.53–1.24)	0.53 (0.25–1.11)	0.87 (0.65–1.18)	0.81 (0.52–1.25)
Age group:				
50–64 years	1	1	1	1
65–69 years	1.62 (1.16–2.27)	0.45 (0.31–0.65)	0.94 (0.71–1.24)	0.75 (0.62–1.02)



	Receive financial gifts		Receive practical help	
	Baltic (n = 3533)	Nordic (n = 3429)	Baltic (n = 3537)	Nordic (n = 3430)
70+ years	1.16 (.89–1.53)	0.35 (0.26–0.48)	2.13 (1.75–2.60)	1.23 (1.01–1.49)
Given gifts (yes/no)	4.60 (3.61–5.86)	1.80 (1.36–2.37)	1.07 (0.86–1.32)	0.99 (0.84–1.17)
Given help (yes/no)	1.91 (1.47–2.48)	2.48 (1.84–3.33)	1.74 (1.42–2.14)	1.25 (1.06–1.46)
Nagelkerke R ²	0.131	0.113	0.076	0.093

Table 4.

Modeling receiving of help (multiple logistic regression, adjusted odds ratios).

The statistically significant covariates are shown in bold font ($p < 0.05$).

	Giving financial gifts		Giving practical help	
	Baltic (n = 3535)	Nordic (n = 3429)	Baltic (n = 3534)	Nordic (n = 3437)
Gender (W/M)	1.09 (0.87–1.36)	0.76 (0.65–0.88)	0.80 (0.65–0.98)	0.78 (0.68–0.90)
Single/couple	0.57 (0.47–0.70)	0.71 (0.61–0.83)	0.94 (0.77–1.14)	0.89 (0.76–1.04)
Has child(ren) (yes/no)	1.62 (1.08–2.44)	2.57 (1.91–3.47)	1.22 (0.86–1.74)	1.33 (1.03–1.72)
Able to make ends meet:				
With great difficulty	1	1	1	1
With some difficulty	1.77 (1.18–2.66)	0.81 (0.48–1.39)	0.85 (0.62–1.16)	0.80 (0.50–1.28)
Fairly easy	3.51 (2.36–5.22)	1.36 (0.83–2.24)	1.47 (1.09–1.99)	0.95 (0.64–1.54)



	Giving financial gifts		Giving practical help	
	Baltic (n = 3535)	Nordic (n = 3429)	Baltic (n = 3534)	Nordic (n = 3437)
Easily	7.45 (4.90–11.31)	2.50 (1.54–4.07)	1.85 (1.32–2.61)	1.18 (0.76–1.82)
Age group:				
50–64 years	1	1	1	1
65–69 years	0.86 (0.64–1.15)	0.85 (0.68–1.06)	0.65 (0.49–0.85)	0.60 (0.48–0.75)
70+ years	0.84 (0.67–1.04)	0.67 (0.56–0.81)	0.41 (0.33–0.50)	0.28 (0.23–0.33)
Received gifts (yes/no)	4.88 (3.84–6.21)	1.97 (1.49–2.59)	2.15 (1.67–2.76)	2.63 (1.96–3.54)
Received help (yes/no)	1.04 (0.84–1.29)	0.97 (0.85–1.17)	1.67 (1.36–2.05)	1.23 (1.05–1.44)
Nagelkerke R ²	0.183	0.111	0.084	0.128

Table 5.

Modeling giving help to others (multiple logistic regression, adjusted odds ratios).

The statistically significant covariates are shown in bold ($p < 0.05$).

In both the Nordic and Baltic regions, women have statistically significantly higher chances of receiving both financial and practical help compared to men, with the effect size being slightly more pronounced in the Baltic states. Single respondents receive more practical help in both regions, with a stronger effect in the Nordic countries. However, for receiving financial gifts, this factor only plays a role in the Baltic states, not in the Nordic countries.

Interestingly, having child(ren) positively contributes to receiving financial gifts in the Baltic states, but not statistically significant in the Nordic countries. On the contrary, having child(ren) significantly increases the odds of receiving practical help in the



Nordic countries but not in the Baltic ones.

Surprisingly, the households' financial situation does not have any statistically significant association with the likelihood of receiving financial and practical help in both studied regions, while we were expecting more needy households to receive more help.

Age, on the other hand, shows opposite tendencies between the two regions. In the Baltic states, the likelihood of receiving financial gifts is higher for people of pension age compared to working-age respondents. In contrast, in the Nordic countries, the chances of receiving gifts considerably decrease with age. Regarding practical help, the trends are unidirectional: no difference in the early pension period, but higher odds in the age group 70+, especially among Baltic respondents.

Reciprocity plays a significant role in both regions, especially for receiving financial gifts, with a stronger effect size in the Baltic states. These findings highlight the complex dynamics of intergenerational support in the Nordic and Baltic regions and the role of various sociodemographic factors in shaping the patterns of help and assistance between generations.

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Carmichael and Charles [] compare men and women engaged in caring for dependents at working age and analyze the impact of informal care on their employment and income. The study shows that caregivers are often women who care for more hours and are more likely to be primary caregivers than men. However, more than 10% of men are also caregivers and more than a third of them are the sole primary caregivers for certain addicts. A recent study using a sample from the Survey of Health, Ageing and Retirement (SHARE) Wave 8 database of more than 12 thousand retirees who, at the moment of data collection, were 65 years and older [] found that there are differences between male and female respondents in predictors of well-being. For males, the longer durations spent with children predicted higher levels of well-being, while for females, this variable was not significant. Unfortunately, the data provided did not reveal any characteristics of the type of activities the respondents engaged in. But based on well-known gender roles that are still very prevalent, it can be assumed that females are more likely to be providing support, care or education during the time spent together with children, while males aged 65 and older are more likely to engage in games, crafts or other practical activities, for example, woodwork, fishing. This difference in the quality and type of activities during the time with children may be the main reason why it is more important for male well-being, since their time together could be described as leisure but has no significant effect on female well-being. "Promoting more diverse and equal



participation in activities can enhance the well-being of older adults. The study conducted by Kraniauskienė and Gedvilaitė-Kordušienė [] analyzed data from the “Gender and Generations” survey in Lithuania, focusing on grandchild care provided by grandparents and its impact on their well-being. The findings revealed that grandparents aged 50–65 were the most active in providing childcare, and about half of them also had jobs. Factors like gender, marital status, subjective health, and living arrangements with grandchildren were important predictors of grandparent involvement in childcare. Lithuania was identified as a country with a relatively high level of support from family networks in terms of grandchild care, possibly due to cultural expectations and limitations in the childcare system. Traditional gender roles were evident, with women being more likely to provide care for grandchildren than men. The study also highlighted that men tended to care for grandchildren from their current partnership, while women cared for both grandchildren from current and past relationships, especially daughters. While older adults’ well-being was influenced by various factors like gender, age, and employment status, the provision of care had a mixed impact. Working men who cared for grandchildren reported lower emotional well-being compared to retired men doing the same. On the other hand, women carers had worse objective relationship-related well-being compared to their male counterparts but better than non-carers. This discrepancy is attributed to differences in marital status and the unequal division of household responsibilities between spouses. The combination of multiple roles, including paid work and grandchild care, appeared to create some conflict and was associated with lower levels of well-being in certain aspects.

Goldscheider et al. [] discuss major changes in family behavior in industrialized countries, known as the “second demographic transition.” The authors draw attention to the retreat from marriage, the increasing number of adults interrupting, delaying, or avoiding official relationships, as well as the separation of childbearing and upbringing from marriage, with an increasing number of children born out of wedlock. They argue that these changes are related to the increase in women’s participation in the labor market. The study also indicates that there are various changes in the relationship between



genders and the formation, growth, and dissolution of families. The authors note that there has recently been evidence of a weakening or even reversal of gender ties in relation to fertility. While previously prevailing theories have explained demographic trends, often excluding gender, this study offers a more influential theoretical approach linking fertility conversion to increased government support for families, which reduces work-family conflict for active parents. However, according to the authors, these changes are related not only to government policies but also to changes in gender relations within the family. They see the increasing participation of men in the domestic sphere of the family as the second part of the gender revolution, which strengthens family relationships.

While a review of existing research findings provides deeper insight into intergenerational solidarity in the Baltic and Nordic regions, it is crucial to acknowledge the limitations in drawing definitive inferences from this body of research. These limitations stem from the numerous socioeconomic, cultural, and even health differences that must be considered when making comparisons between the two regions or when suggesting policy development.

Attempting to encompass all of these major and minor differences would lead to conclusions that are overly complex and nuanced, potentially making them overwhelming and impractical. It is important to recognize that, despite being based on available empirical evidence, some of the conclusions or policy recommendations may have limited applicability within specific regions or populations due to subtle distinctions that exist.

However, the intricacies of cross-cultural comparisons and the acknowledgement of these possible limitations should not deter further research and investigation into intergenerational solidarity across various regions. Instead, they underscore the need for continued exploration and a nuanced approach to understanding and addressing the complexities of intergenerational relationships.

3. Conclusions and policy recommendations

3.1 Conclusions and recommendations in the social policy field

3.1.1 Promoting intergenerational solidarity, understanding and respect

Implement initiatives to foster better understanding and respect between different generations. Develop educational programs that promote positive intergenerational interactions, challenging ageist stereotypes and highlighting the value of older individuals' knowledge and experience.

3.1.2 Strengthening family support systems

Invest in social policies and support systems that encourage intergenerational solidarity within families. This could include providing resources and services that facilitate family care and assistance for older family members, recognizing the contributions of older individuals in family settings.

3.1.3 Emphasizing family relationships

Acknowledge the importance of strong family ties and mutual care within families. Encourage family members to provide help and assistance to each other, recognizing the significant impact of intergenerational support on overall well-being.

3.1.4 Enhancing family values and traditions

Support initiatives that preserve and transmit family values and traditions in both regions. These values can foster closer and more supportive intergenerational relationships, contributing to the well-being and longevity of parents and older family members.

3.1.5 Addressing sociodemographic factors

Acknowledge the influence of sociodemographic factors on intergenerational support and care. Develop policies that consider gender, age, marital status, and household income when designing support systems and assistance programs for older



individuals.

3.1.6 Targeted support for caregivers

Provide targeted support for caregivers, particularly those engaged in informal care for dependents. Offer financial assistance, friendly working conditions, and access to recreational opportunities to help caregivers balance their caring responsibilities with employment.

3.1.7 Addressing age discrimination

Develop awareness campaigns and programs aimed at combating age discrimination in both Nordic and Baltic countries. Promote inclusive attitudes towards older individuals, emphasizing their contributions to society and the importance of treating them with respect and dignity.

3.1.8 Strengthening social safety nets

Strengthen social safety nets to ensure adequate support for older individuals in need. This includes providing financial aid, healthcare, and long-term care services for older people, with a focus on meeting the diverse needs of older populations in both regions.

3.1.9 Embracing the second demographic transition

Embrace the changes in family behavior and gender roles associated with the “second demographic transition” in both Nordic and Baltic countries. Develop policies that support work-family balance and encourage men’s increased involvement in domestic responsibilities, promoting stronger family relationships.

3.2 Understanding resource transfer patterns

Continue research and analysis on intergenerational resource transfer patterns in Western European countries, as shown in the Albertini et al. [] study. Utilize this knowledge to inform policies and interventions that promote equitable resource transfers between generations, addressing the needs of both older and younger family members.



3.3 Proposals for the dissemination of best practices and their adaptation to the local conditions

3.3.1 Embracing regional best practices

Adapting and transferring intergenerational solidarity strategies. In the pursuit of enhancing intergenerational solidarity, Nordic and Baltic countries can benefit from embracing the regional aspect by drawing inspiration from successful initiatives in neighboring countries while tailoring them to their unique cultural and economic contexts. This approach acknowledges the interconnectedness of these regions and the potential for cross-country learning to drive positive change.

3.3.2 Transferring best practices

There are several countries within the Nordic and Baltic regions that have implemented effective strategies to strengthen intergenerational bonds and promote the well-being of older individuals. For instance, a country might have launched educational programs encouraging positive interactions between generations or established supportive policies for family caregivers. These initiatives have the potential to offer valuable insights and proven methods that can be adapted to the local setting.

3.3.3 Adjusting to local context

While transferring best practices, it is crucial to recognize that each country has its own unique cultural, historical, and economic characteristics that shape the dynamics of intergenerational relationships. Therefore, the imported practices should be adjusted to ensure they align with local values and societal norms. Cultural sensitivity is essential to ensure that the strategies resonate with the population and foster genuine connections.

3.3.4 Tailoring cultural aspects

Different countries may have distinct family structures, traditions, and values that influence intergenerational dynamics. Strategies that have successfully encouraged mutual support and respect in one context might require customization to align



with the cultural nuances of another. By understanding and integrating these aspects, countries can effectively promote intergenerational solidarity in a way that feels authentic and meaningful to their citizens.

3.3.5 Considering economic realities

Economic factors also play a significant role in shaping intergenerational relationships. Strategies that involve financial support or assistance may need to consider the economic conditions and challenges specific to each country. Tailoring these strategies to address local economic contexts ensures that they are realistic and achievable, maximizing their impact on both older and younger generations.

3.3.6 Collaboration and knowledge sharing

Implementing successful strategies from neighboring countries involves collaboration and knowledge sharing. Governments, organizations, and researchers can engage in dialog and exchange insights to identify approaches that have proven effective elsewhere. Regional partnerships can facilitate the exchange of ideas and resources.

These policy recommendations aim to promote intergenerational solidarity, address age discrimination, and support family values and relationships in both the Nordic and Baltic regions. By implementing targeted policies and interventions, these countries can enhance the well-being and quality of life of their aging populations while fostering positive family dynamics and social cohesion.

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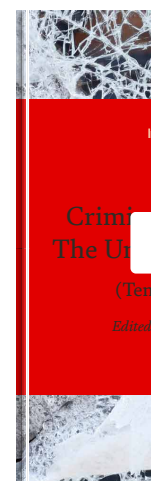
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