INTRODUCTION

The ageing of societies has strong implications for social security and for social gerontological analysis, while diversity, social inequality, and social justice are traditional core themes of sociology and social policy. Both perspectives are interrelated, as demographic transitions may, on the one hand, be influencing the social status attached to age and cohort membership. On the other hand, current reforms of welfare state systems – partly in reaction to demographic shifts, partly motivated by changing ideologies and ongoing processes of globalization – may have effects on the average welfare situations of people of different ages and cohorts and the distribution of these situations within age groups and cohorts. In the current debate, distributive relations between generations as age groups as well as birth cohorts are discussed as a crucial problem of inequality and justice in modern society. The role of generational equity in this debate is becoming increasingly dominant, both in Germany and in other European societies (Schmähl, 2004). However, the meaning of this term is still unclear and is used quite arbitrarily in current debates. Popular societal discourse in particular is characterised by a muddle of disparate ideas about social justice, distributive norms, and patterns (Tesch-Roemer and Motel-Klingebiel, 2004; Clasen and von Oorschot, 2002). Beyond doubt, there are problems with distribution and equity in most modern welfare states, as demonstrated by contemporary disputes; the assumption is often found that the young could be disadvantaged by the setting up of modern welfare regimes, while the old face enormous gains from the expansion of social security systems (Bommier et al., 2004; Price and Ginn, 2003). In such a zero-sum game the welfare of one age group clashes with welfare of another (e.g. Bäcker and Koch, 2003 – and featured years ago in the dispute between Preston (1984) and Easterlin (1987)). Even if this ‘only’ reflects simplified subjective perceptions of social change and ‘real’ problems, a legitimation deficit could result for the extensive redistributive role of modern welfare states. In the absence of a satisfactory reaction in key societal discourses, including scientific debates, a potential for conflict could be the result. To define the perspectives of such reforms for improving generational equity, various welfare regimes, and their redistributive components are discussed as blueprints within the national debates.

From a social gerontology perspective, however, intergenerational equity – and thus intergenerational cohesion in social security – is just one important issue among many. Another core question is the effect of such diverse redistributive systems on inequality patterns in later life. Both dimensions may have important consequences.
for societies as a whole, since demographic developments as well as intergenerational relations, wider social networks, and well-being on an individual micro level or the societal macro level can be influenced by individual activities such as childbearing, care for older relatives, and employment activity being recognised and rewarded by the welfare state. Decisions on whether or not to adopt such activities are themselves influenced by their inequality repercussions or the (dis)advantages associated with them. Hence, reforms leading to further privatisation of social security may not only exacerbate equity problems but also boost conflicts between production and reproduction.

It is primarily the institutionalisation and the extent of societal redistribution of resources and, consequently, life chances that allow social scientists and social policy analysts to differentiate between different types of welfare systems, as for instance defined by Titmuss (1963, 1987) and Esping-Andersen (1990, 1999). It is a common characteristic of all of these systems that they basically rearrange distributive patterns between social groups at a certain point in time – employed and unemployed, healthy and sick people, men and women. But conventionally, welfare states do not explicitly redistribute between generations as birth cohorts, although provision for old age can be discussed as redistribution over the individual life course and, hence, over time, and pension schemes can contribute to intergenerational risk-sharing and diversification. Intergenerational redistribution by welfare state systems seems to be more a by-product of intra-cohort allocation of resources. While economic growth and prosperity for some time prevented a clash of both perspectives, the relationship between them became crucial during the economic and demographic crises of modern societies. Intergenerational equity as a political goal was on the agenda and came under discussion as the continuous improvement of the economic conditions for following birth-cohorts became more and more questionable. This affected both the moral and the political economy of ageing within modern welfare states. It also has implications for current welfare state reforms and the core dimension of intragenerational distributive patterns as such. Reforms based on generational equity figures, for example as implemented in Germany, mainly focus on a substantial reduction of social security levels in the contribution-and/or tax-based pay-as-you-go-pillar in favour of a basic provision and a strengthening of insurance principles within the public system of old age provision, in earlier as well as in recently established private pillars. Mid- and long-term effects on inequality relations in later life are likely and urgently need to be researched as a substantial social gerontological input to ongoing social policy debates.

THEORY AND MEASUREMENT OF QUALITY OF LIFE AND SOCIAL INEQUALITY

In order to discuss the link between welfare systems and inequality in later life empirically, it is useful to define a sphere which is essential for social inequality. Quality of life (QoL) emerges as a valuable category in this perspective, since it can be defined as a significant outcome of unequally distributed living conditions and opportunities in social environments. QoL is a multidimensional construct and