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REDESIGNING SOCIAL GROUPS. UNDERSTANDING THE YOUNG-ELDER DIVIDE[1]

abstract

The aim of this paper is to examine the explanatory power of the concept of "generational social group". With this aim, we will analyze the three main meanings of "generation", namely cohort, kinship, and social group. Among them, the social group meaning appears to be the most promising one, as it enables us to understand group behavior and its normative implications. However, some clarifications are necessary. Firstly, the conventional understanding of social groups within social ontology needs to be supplemented with a sociological analysis that recognizes them as peer groups. This entails considering shared characteristics, social interaction, and the sharing of values, which contribute to the recognition of belonging within the group by both insiders and outsiders. Secondly, in literature, the concept of generation inherently implies the existence of generational conflicts. However, these conflicts can be mitigated and reconceptualized within the framework of the advantaged-disadvantaged dichotomy, which is, to some extent, independent of age.

keywords

generation, social groups, peer groups, Welfare State

1 This publication is part of the activities of the PRIN 2022 project "Next Generation Ita. Increasing Trust, Making Future Generations Possible".

Phenomenology and Mind, n. 28 - 2025, pp. 48-58
DOI: 10.17454/pam-2804
https://www.rosenbergesellier.it/eng/journals/phenomenology-and-mind

ISSN 2280-7853 (print) - ISSN 2239-4028 (on line)

1. Introduction

Demographic projections concerning global population growth necessitate analysis not only of environmental sustainability but also of the sustainability of welfare systems, which serve as the bedrock of our societies. It is widely acknowledged that "population ageing is a challenge to intergenerational solidarity, both privately within families and publicly in society" (Daatland, 2009, p. 124). We operate under the presupposition that our future well-being hinges on these systems. Therefore, we will not examine alternative methods to promote social well-being. However, by re-evaluating our welfare systems, we have an opportunity to foster inclusive welfare policies, particularly towards the elderly, considering two key factors:

a) The aging of the global population, projected to have one individual over 60 for every five people by 2050 according to the World Health Organization (WHO). This demographic shift places significant strain on welfare systems, primarily due to the elderly being the category that has the most substantial impact on public expenditure. We will explore how this notion can be challenged. Nonetheless, it is crucial to grasp potential future scenarios in order to devise viable solutions before it becomes too late.

b) More broadly, welfare systems face challenges stemming from the technological revolution, which brings about an abundance of information on each individual. This, in turn, leads to a well-documented crisis in pay-as-you-go systems (Iversen & Rehm, 2022), where social solidarity-based schemes fund current pensions using taxes paid today. The gap between the advantaged and disadvantaged widens as different conditions apply to people whose information indicate that they will be more in need in the future. Consequently, we must question how this change will affect the elderly, belonging both to current and future generations, to what extent, and what measures should be taken to maintain a fairer system.

This is the social frame of reference that motivates a theoretical analysis such as the one that follows, aimed at an understanding of the young-elder divide. Typically, the dynamics between younger and older individuals have been studied through the lens of intergenerational justice, drawing on research on intergenerational relationships. This line of study originated in the United States (e.g., Sussman & Burchinal, 1962) and later expanded to Europe (e.g., Pitrou, 1977; Willmott & Young, 1957/1986). However, discussing the elderly as a generational group prompts two separate yet indispensable questions: What does 'to be old' mean? and what defines a generation?

The answer to the first question lies in social constructs. Hence, the concept of social

aging becomes relevant. "Social age is structured around life stages, which consist of social roles derived from life events (e.g. becoming a grandparent), physical changes (e.g. frailty), or transitions (e.g. from paid employment into retirement)" (Morgan & Kunkel, 2007, p. 15). Simone de Beauvoir's work, *Coming of Age*, provides a notable example of such an analysis. It emphasizes the fact that entering old age is not solely determined by reaching a specific age, but it is also influenced by cultural and historical factors, which vary across different historical time periods. Moreover, reaching old age appears to carry normative elements (Bordone, 2012), particularly when considering social age. This suggests that being elderly entails more than merely reaching the age of 67 (or the average age of retirement); it involves considerations regarding appropriate behavior, societal expectations, and what older individuals can rightfully expect from both their families and the state.

However, even if we were to establish a shared understanding of 'old ag' (which, incidentally, is not the case), we would still question what qualifies as a 'generation'. Indeed, this seems to be the customary frame of reference when discussing the transition to old age, especially in the context of intergenerational studies, as the name suggests.

It is precisely from the analysis of the term 'generation' that we start to achieve the paper's goal, which is to elaborate on a possible use of 'generation' in consonance with the theories of groups proper to social ontology, but useful at the same time to understand the generational question. The aim is to examine the explanatory power of the concept of 'generational social group'. In this sense, we intend to do some preliminary theoretical work that may be useful in addressing the welfare-related issues identified at the beginning of this section. With this aim, we will question the definition of both generation and social group – meant as two related parts of the same expression.

In the upcoming pages, with the pertinent framework of discussion centered around the reevaluation of our welfare systems and a societal perspective on age, we will initially delineate three interpretations of the term 'generation'. Subsequently, our attention will be directed towards the third meaning, which holds greater significance from the standpoint of social ontology. To fully grasp its implications, however, it becomes imperative to delve into the definition of social ontology concerning social groups and discern certain constraints prevalent within conventional social ontology in this context. This exploration will provide us with a valuable tool in utilizing the notion of social groups to elucidate the concept of generation. In the last part of the paper, we will see how this use can impact the notion of conflict between generations, which is often used both politically and theoretically to justify certain choices concerning our welfare systems.

2. What counts as a generation?

To address this question more comprehensively, we need to delve deeper into the central concept of generation in intergenerational studies and justice. The term 'generation' encompasses at least three distinct yet interconnected meanings. There exist various methods of categorizing individuals based on their age, each with its own objectives or guiding inquiries. Consequently, individuals grouped within a generation may remain unchanged, yet the rationale behind their grouping and the anticipated characteristics defining them as members of the same generation may change.

Firstly, 'generation' can refer to a birth cohort (Iparraguirre, 2018; Vincent, 2003, p. 33). In this context, it represents a group of individuals who share the common characteristic of being born within a specific time frame or year. However, these individuals may have vastly different socio-economic conditions. This interpretation is useful in the fields of Demographics and Economics for making predictions, such as retirement projections. Nevertheless, it falls short in terms of understanding the discriminatory trends within a society or introducing measures to safeguard against such discrimination (Hendricks, 2004, p. 250).

Secondly, 'generation' can denote 'kinship', signifying one's position within the family. Consequently, grandparents, parents, children, and so forth are considered different generations. This concept of generation is particularly significant to study the micro-level dynamics and the impact of family relationships on the well-being of the elderly population. Numerous studies examine the influence of kinship on the support systems for both young and elderly individuals (cf. Daatland, 2009; De Santis, 2012; Izhuara, 2010). The first and second interpretations categorize individuals similarly, albeit with distinct emphases: the latter adds the familial bond to a temporal positioning of groups of people. Thus, according to the first distinction, I would be a member of people born in 1992 and this information could be used to make projection about my life expectancies, retirement, or work-period projections, etc. According to the second distinction, I would be categorized in relation to my familial bonds, such as a mother, daughter, and granddaughter, still with projections made in relation to other people born in the same period, for example, determining if I am a young or old mother.

From a philosophical perspective, Tiziana Andina (2022) explores primary transgenerationality, conceptualized as a kinship bond, as the foundational form of relationship between distinct generations, offering a valuable framework for comprehending broader societal interactions. While essential and deserving recognition, this level of analysis only partially pertains to the macro-level considerations impacting welfare policies.

Lastly, 'generation' can also refer to a social group characterized by historical and cultural attributes, often designated with a name such as baby boomers or Generation Z (building on Karl Mannheim's seminal work in 1927). According to this definition, the awareness of belonging to a specific generation and the shared attitudes, behaviors, and experiences are crucial. It involves the cultivation of a collective identity grounded in a sense of belonging that could prompt collective actions. In this case, a person born in 1992 would be classified as a millennial (or a member of Generation Y), and this categorization would assist us in predicting their tastes and attitudes with sufficient accuracy. Once more, the outcome of grouping may appear identical, given that a generation is a birth cohort, but with an additional emphasis on the identity of the individuals involved. Critics argue that this attribution of generational identity is retrospective and may not genuinely influence people's behavior (Arber & Attias-Donfut, 2000, p. 5), precisely because individuals may not be aware of belonging to a specific generation until they are categorized as such by external observers at a later stage.

Incidentally, it is important to note here the potential for confusion between 'generation' and 'age group'. Age groups refer to categories such as young people, teenagers, and the elderly. Generations, on the other hand, denote individuals born at a certain time, even if from different perspectives. This means that over the course of a lifetime, an individual may transition between different age groups, while they cannot change generations. However, it is true that when analyzing society at a specific time period, from a synchronic perspective, the two concepts coincide. Therefore, if one wishes to analyze the dynamics of contemporary society, everyone belonging to the same generation will also belong to the same age group.

From the point of view of social ontology, the third meaning of generation holds the greatest promise, as it encapsulates fundamental concepts and methodologies prevalent in philosophical discourse, such as self-identification, the sharing of values, and the sense of belonging (e.g. Schmid, 2009). Indeed, these are attributes typically associated with social groups according to established theories in social ontology. By going deeper into this interpretation of generation in conjunction with the examination of social groups, we can discern its significance as not only a driver of social diversity (Vincent, 2003, p. 31ff) but also a potential catalyst for discrimination, necessitating attention and proactive measures. It is through this lens that we can comprehend an age group as both the subject and object of social actions – wherein social actions are construed in a technical sense (Tuomela, 1984) as an

intermediary between individual actions (such as opening an umbrella when it starts raining) and collective actions (like performing a choreographed dance)[1].

3. How to intend social groups

While the third interpretation emerges as the most promising from our standpoint, it is crucial to proceed with caution. The standard theories in social ontology pose challenges to categorizing generations and age groups as social groups due to their inherent features. However, an alternative approach to conceptualizing social groups may prove beneficial for our purpose. To address this shift, we will explore a nonstandard perspective with the assistance of sociology.

In general, philosophy, and social ontology in particular, have approached human groups from a specific perspective. They have primarily focused on the types of actions that groups can undertake, distinguishing between collectives and aggregates. Collectives have the capacity to act together, whereas aggregates do not, primarily because aggregates consist of random individuals, such as those who happen to be in the same place at the same time. In contrast, collectives are characterized by individuals unified by common goals (e.g., Gilbert 1992 highlights this distinction). According to standard theories in social ontology, consequently, only collectives are social groups, and they consist of individuals who are committed to engaging in joint actions. However, the standard view seems to overlook elements that we consider relevant when looking at the social world. By primarily focusing on typical and cooperative scenarios, it fails to account for a significant portion of social reality that becomes central when analyzing the relationship between individuals and groups. Indeed, the standard view usually obscures conflictual, socially structure-dependent phenomena to focus almost exclusively on positive, coordinated, and successful ones. This approach is insufficient for understanding human behavior within society in a comprehensive or nuanced manner. We believe this limitation arises from analyzing coordination as the primary feature of collective action. Consequently, philosophers have primarily focused on neutral examples (as showed by Burman 2023) such as walking together, moving a piano upstairs, playing a duet (respectively, Gilbert, 1987; Tuomela & Miller, 1988; Searle, 1995), and have neglected to specify the differences that exist between being part of one group instead of another (De Vecchi, 2022), particularly because standard theories in social ontology have completely disregarded the question of personal identity[2]. According to Burman's recent book, a crucial characteristic distinguishing standard theories in social ontology, which she refers to by 'ideal social ontology'[3], is the lack of consideration for the issue of oppression. We do not aim to investigate the potential manifestations of systematic or non-systematic oppression affecting age groups. Nevertheless, we echo the criticism of conventional perspectives, especially concerning the emphasis on collective intentionality and their methods of delineating social groups[4].

1 The first example is borrowed by Gilbert (1992) from Max Weber, the second is famously articulated by Searle (1990).

2 Standard theories in social ontology have faced criticism from various perspectives. Epstein (2019) has offered critiques from a metaphysical angle. Additionally, Guala (2007) presents the SMOSO (Standard Model of Social Ontology), which amalgamates the characteristics of standard theories, including reflexivity, performativity, and collective intentionality. Moreover, Kutz (2000) describes the 'string quartet paradigm', which highlights small and coordinated groups as the quintessential example in social ontology. These contributions underscore the diverse critiques and perspectives within the field.

3 The distinction between ideal and non-ideal theories is borrowed from Mills (2005).

4 It is also noteworthy to mention the concept of opaque phenomena, which refers to those typically unknown to individuals and thus not dependent on their conscious creation (Thomasson, 2003). According to Burman (2023), the existence of opaque phenomena represents an additional limitation of ideal theories. However, we will not explore the possibility of opaque phenomena in relation to the understanding of age groups.

Indeed, within social ontology, only two possibilities seem to be considered: either we act in a coordinated manner, or we do not; either we attain the status of a collective or we act as individuals. However, it appears that this distinction is not further elaborated upon, leaving us without the necessary tools to explore the various ways in which we can engage in collective action and the implications this holds for our agency as members of specific groups. This dichotomy appears incomplete, particularly when analyzing groups that differentiate members based on their age. Starting from the standard analysis, we are compelled to exclude certain types of actions from our consideration, even though they appear strongly socially oriented. The standard view is simplistic but could be complemented by a sociological analysis that incorporates the notion of peer groups (Martino, 2023). Only through this approach can we truly understand how individuals belonging to the same generation can act together, but also be both the subjects and objects of specific forms of discrimination.

One possible approach to shed light on this topic and develop a more comprehensive theory can be to examine the criteria commonly employed in sociology to distinguish between different types of groups. In this regard, the distinction between social category, group, and collectivity proves highly useful (see the table below). It employs three criteria – namely, the possession of common features, the presence of social interactions among individuals, and the sharing of values – to distinguish between different types of groups.

	Common Features	**Social Interaction**	**Shared Values**
Social Category	✓	×	×
Peer Group	✓	✓	×
(Social) Group	(×)	✓	✓
Collectivity	(×)	×	✓

Table 1. Group's Categorization by Sociology

According to this table thus, social categories encompass status aggregates without social interaction. When such interaction occurs, peer groups can form. Collectivities, on the other hand, consist of individuals who share values, solidarity, and moral obligations. In this sense, all groups are collectivities, but not all collectivities attain group status. In fact, three criteria are necessary for a group to be considered as such: the presence of effective social interaction, the awareness of belonging to the group (named 'sense of belonging'), and the recognition of this belonging by others, both within the group and from outsiders.

By amalgamating these two distinct approaches to categorize groups – through social ontology and sociology – we can adopt a tripartite framework that aligns more closely with sociological analyses of social reality and human groups, while still remaining consistent with the broad perspective of social ontology (see table 2 below).

Aggregate	Peer Group	Collective

Table 2. Proposed Taxonomy

As a result, we would have aggregates (groups without collective intentionality), equivalent to the social categories outlined in sociology. The aggregate, in this sense, is not merely a random grouping (as the set of people with blue eyes, as in the standard example by Gilbert, 2013, p. 59), but corresponds to Katherine Ritchie's Type 2 groups (2013), i.e. racial groups, gender groups, ethnic groups, and sexual orientation groups. They involve shared features

and are difficult for a member to choose to join or leave (p. 315). Thus, we can identify status aggregates characterized by a similar social condition, high variability of members, absence of a will to be part of the group, and a lack of collective intentionality, as understood in various social ontology theories. This category aligns with the term 'birth cohort' we referred to in the previous section. Indeed, a birth cohort is a designation based on the year in which people were born. It is independent of our will and, as seen in the previous section, it is primarily utilized by external observers to make predictions.

On the opposite side, we have collectives, which correspond to what we have referred to as 'social groups' from a sociological perspective, namely the presence of effective social interaction, an awareness of belonging to the group, and the recognition of this belonging by others. Indeed, the definition of collectives in social ontology exhibits characteristics that are overly strict to adequately describe generational groups, or even age groups. A collective should possess various traits such as collective intentionality, common knowledge, readiness to act together, and so on and so forth. These characteristics can certainly manifest in specific contexts, such as generational struggles or particular generational sub-groups that recognize themselves as such and share common ideals and goals[5]. However, it cannot serve as the standard interpretation for understanding the role of generational groups in society and designing inclusive future scenarios. Yet, simply referring to the opposite pole of the dichotomy used in social ontology is insufficient for this purpose. Doing so would lead us back to a situation similar to that of cohorts, which fails to capture the element of social unity that can emerge from a generational group. It is in this regard that we advocate for the inclusion of peer groups as a valuable reference, not only for the dynamics they may generate among peers, but particularly as the potential objects and subjects of collective actions, not necessarily driven by collective intentionality as conceptualized by non-summative accounts[6].

Indeed, there are collectives that do not attain group status, as well as categories that involve social interaction. This intermediate scenario arises when social interaction is added to a status aggregate, resulting in peer groups (Martino, 2023), or when there is a sharing of values without social interaction. This aspect is particularly intriguing as it allows us to challenge the standard dichotomy.

By definition, peer groups are made of individuals who identify themselves and are recognized by others as a distinct social group. These groups may define themselves based on shared social characteristics such as age, gender, sexuality, occupation, or ethnicity. They develop shared norms, culture, rituals, and socialize new members according to these traits (Turner, 2006, pp. 256ff). This is interesting because, from a sociological perspective, peer groups are considered proper social groups, but the characteristics mentioned align with examples of aggregates rather than collectives, as defined in social ontology, particularly in Margaret Gilbert's distinction. Despite the explicit acknowledgement that peer groups are recognized as such by the community, and therefore may involve a form of joint commitment, Gilbert explicitly rejects the idea that groups of people, named populations, such as classes of people, qualify as significant collectives. According to Gilbert, establishing proper joint commitment towards all members of such groups is not feasible (Gilbert, 2005). Examples cited include hemophiliacs and the elderly (p. 40). The same observation then would apply to age

5 In this case, scholars often deal with partial generations, i.e., people part of the same generation (meant as cohort) who share specific social characteristics, such as profession or familiarity with a specific technology, that distinguish them from other members of the same generation (Becker 1992; 2000).

6 The differentiation between summative and non-summative accounts in social ontology is widely recognized and originates from Quinton (1975). In short, non-summative accounts assert that collective intentionality is not merely the sum of individual intentionalities, but rather something qualitatively distinct.

groups or generations in general, as they seem to share similar characteristics with classes, or populations.

In our taxonomy, peer groups are considered to be something less than collectives, as they do not share common goals to be achieved through joint commitment. However, this does not imply that collectives, in general, should be eliminated from our ontology of the social world, as they represent a relevant phenomenon, albeit perhaps less common than standard social ontology suggests. At the same time, peer groups do not overlap with aggregates, as they encompass something more than a mere collection of people sharing relevant common features, such as age or birth period. Peer groups become the subject of social actions and can be seen as a unity influencing individual and collective identities.

In this way, then, we will have a conceptual tool that will allow us to understand actions taken by and about generational groups, avoiding the two opposite extremes, namely either considering a generation exclusively as a set of individuals with their present age in common or considering them as a group acting in concert toward a common goal. The intermediate possibility allows us to understand common dynamics and even shared actions, without forcing us to appeal to a whole series of constraints that are unrealistic when moving from theory to practice and, at the same time, without the need to abandon the social ontology approach that otherwise offers us more than useful tools for understanding social reality.

4. Generational conflict in question

The second element of discussion mentioned earlier is the use of 'generation' to describe age groups in sociological studies, which usually implies the notion of generational conflict. This perspective often portrays the young and the elder as two distinct groups with an absolute and irreconcilable contrast (think of studies on generations during the sexual revolution of the late 1960s). Consequently, the elderly are often perceived as an escalating burden on society due to factors such as the prolongation of retirement periods, the strain on healthcare systems, and the rising proportion of elderly individuals compared to the working-age population. However, various data indicate that these arguments are at least partially ideological rather than purely economic or demographic in nature (Vincent, 2003, pp. 80ff, and 143ff)[7].

However, another point should be made, albeit preliminarily here. Maintaining the concept of generational social groups can help us recognize the normative and discriminatory structures inherent in our society and deal with generational actions, considering the elder and the young as possible bearers of collective (even though not necessarily coordinated) actions. However, the reference to it should not be the sole guiding principle for our policies. Instead, it must be intersected with considerations of advantages and disadvantages (Bonatti & Lorenzetti, 2023) or, more directly, of the poor and the rich, as the experience of growing old can vary significantly among individuals. Indeed, we believe that merely focusing on the concept of generation carries the risk of being misleading and may lead to the explanation of discriminatory actions solely in terms of generational conflict, which is only partially helpful or even accurate. This is especially the case if we make the generational social group coincide with the birth cohort. The necessary first step, which we have identified, is precisely to separate these two meanings. However, it remains that in public debates it

7 Think of the pressure group Americans for Generational Equity (AGE, 1990), founded in 1984, which precisely advocates the need to limit the burden of the older population on younger generations of workers, especially with reference to the so-called baby boomers (Becker, 2000; Kholi, 2005). Studies on voting projections and the possibility of older individuals attaining an absolute majority over younger demographics are subjects of ongoing debate (e.g. Sinn & Uebelmesser, 2003). For example, there is a question as to whether the elderly will prioritize voting solely for their own interests, potentially at the expense of younger or future generations (Kholi, 2005). This has sparked a growing interest in political philosophy and political sciences, making it a topic of considerable significance.

seems difficult to make a clear distinction. Instead, it is imperative to reassess the concept of generational social groups and, concurrently, to consider the interests for which these groups can advocate. It is essential to acknowledge that in real society – contrary to the standardized depiction sometimes presented by social ontology – each individual is a member of multiple social groups simultaneously, but also diachronically. This reality underscores the potential for overlapping interests among multiple generational groups, particularly when other discriminatory factors beyond age are in play. In such a context, an intersectional approach (term coined by Crenshaw, 1989) becomes pertinent, integrating the factor of age while recognizing the constraints on agency not only for age groups as a whole but also for subgroups. For instance, this approach acknowledges the challenges faced by women from ethnic minorities who are also elderly, or conversely, young individuals.

What we intend to emphasize is how a revaluation of social groups, by taking into account the characteristics we have listed from an integrative perspective that surpasses the standard conception of groups in social ontology, would be a fundamental starting point for untangling this complex debate. This approach allows for a deeper understanding of a concept that, although requiring accurate calibration, remains central in order to analyze and target welfare policies more equitably, i.e. generation as an age group.

5. Conclusion

In this paper, we have embarked on the initial steps toward recalibrating welfare policies, starting with an analysis of their primary focus: generations. However, it is crucial to disambiguate this term due to its various meanings across different contexts. In our case, where we aim to define the elderly as both the objects and subjects of collective actions, specifically in relation to non-discriminatory welfare policies, we have opted to adopt the third meaning of 'generation' – generation as a social group. Nonetheless, we have also recognized the inherent ambiguity associated with this terminology. In the realm of social ontology, our primary reference, the term entails additional conditions that extend beyond the criteria set by sociology, which makes it challenging to perceive the elderly as a distinct social group.

Hence, we have sought to highlight the limitations of the standard conception in social ontology while introducing the notion of a peer group, which we believe is more appropriate within our context. However, this does not imply a wholesale adoption of the sociological interpretation of generations, as that often entails the notion of generational conflict – a concept that is not necessarily essential for comprehending generations and the actions they may undertake.

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