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FOREWORD

The demographic transition, urbanization, secularization, and economic development currently under way in most countries are frequently associated with changes in the family and community organizations that have traditionally cared for the vulnerable. Concern centres on the notion that traditional forms of social support may not persist and yet, for the developing countries, state intervention of the type attempted in the industrialized countries may not be appropriate.

At various points in historical development, industrial nations have increased state intervention to reallocate welfare resources to deal with the problem of poverty and need. The search for a viable social safety-net for those on the periphery of society – the unemployed, the underemployed, single-parent families, children, and the aged – is an important concern that many developing nations, undergoing rapid social transformation, will probably face in the coming decades.

The need to study the socio-economic consequences of the demographic transition in the developing countries is becoming more explicitly recognized. Towards the beginning of the next century, the age profile of the world's population is projected to become significantly older as a result of changes in fertility and mortality. By 2025, the proportion of children will decline to 26 per cent in the developing countries, while the proportion of the aged will reach 12 per cent. In the industrial countries, there will be more older people than young by 2025, with 20 per cent of the population in the 0–14 age-group and 23 per cent in the 60-plus age-group. In absolute terms, the number of persons over 60 years of age in the world is expected to multiply from 376 million in 1980 to 1,121 million in 2025, with more than 70 per cent of these living in the developing countries. Yet changes in the support systems required to meet the changing demands of the ageing population remain particularly underresearched.

Within this context, the goal of the United Nations University project "Social Support Systems in Transition" has been to generate a series of studies focusing on support systems affecting the aged in the changing social environment of the third world. The countries included in the project represent great cultural diversity: Brazil, Egypt, India, Singapore, the Republic of Korea, Thailand, and Zimbabwe. Empirical research was undertaken in 1987–1988 and yielded valuable informa-

tion and knowledge, of which this monograph constitutes an important part. I would like to take this opportunity to thank all the investigators who tirelessly laboured to accomplish this goal.

Akiko Hashimoto
Pittsburgh, November 1990

PREFACE

In a developing country, such as Egypt, the dividing lines between the social, economic, political and religious spheres are not always clear-cut. Experience has shown various instances of overlapping, of transmission of ideas or concepts from one sphere to another, sometimes involving the subordination of a particular sphere to another. Such phenomena are not fortuitous, but have their *raison d'être* in specific cultural patterns influenced by certain historical incidents, stages of development, and other determining factors. Developments in the field of social policy are no exception, and a full understanding of the factors at play is a prerequisite for an understanding of existing policies and for planning for the future.

Correspondingly, support systems for the aged in developing countries are not merely autonomous, impersonal institutions. Various forms and features of these systems are determined, or at least influenced by, cultural and traditional considerations.

Furthermore, the choice of policy is not a simple mechanistic or professional endeavour. Quite often, values, traditions, and social expectations restrict one's freedom to choose between possible or alternative policies. However, traditional systems – including support systems – are far from being immune to outside influences. Social change, economic pressures, political developments and other national and international factors make themselves felt in various spheres of Egyptian life. Sometimes, changes are forceful and rapid, especially in the economic sphere. At other times the eroding effects of change on the social and cultural spheres are much more gradual – indeed, they may be barely noticeable in the short term.

In view of these considerations, planning for and/or assessing the impact of social policies, including support systems for the aged, involve far more than the mere laying down of regulations and assessing their effectiveness and implementation. A thorough analysis has to cover a much wider spectrum of related factors.

However, this task cannot be undertaken within a vacuum. Some guiding principles are needed and in the case of Egypt there would be little controversy as to their choice. In the declared strategies for social policy, social justice is given supremacy, and in fact features as its ultimate goal.

Accordingly, chapter 1 begins with a conceptual query: is it feasible to speak of

social justice for the aged? Chapter 2 follows with a description of the Egyptian setting, outlining recent historical developments that have had an impact on life in Egypt and describing the various factors and influences that have contributed to the formulation and development of social policy in the country.

The next two chapters deal with our subject matter proper, reviewing the literature on support systems for the aged in Egypt, and giving an outline of our research design and methodology.

Part 2 describes the profile and demographic characteristics of the research community. It also summarizes the main characteristics of the research sample, and gives an assessment of its socio-economic and health condition.

Part 3 deals with the bulk of the research findings on formal and informal support systems for the aged, ending with reflections on these findings and on policy considerations within the framework of social justice.

CONTENTS

PART 1

CONCEPTUAL FRAMEWORK

1

SOCIAL JUSTICE FOR THE AGED?

A review of literature on social justice reveals a wide spectrum of interpretations and diverse theoretical conceptualizations. The diversity may be illustrated by reviewing two theories that stand at opposite poles to each other.

The first, which is an egalitarian theory, alleges that man's rights to freedom and equality are natural endowments, which he possessed and enjoyed in a hypothetical state of nature.

Conversely, a "conventionalist" theory of justice refutes the existence of "rights" prior to the formation of communities, and consequently denies the existence of so-called natural rights. Moreover, the theory claims that moral principles, including social justice, are mere social constructs which vary in different societies. Some proponents of this view take an extreme stance by claiming that the principles of justice in each society are determined through moral bargaining.

Other theories on social justice range between the two poles. But empirical and historical evidence supports a sociological interpretation. Analyses of the different conceptions of social justice reveal a functional relationship between each conception of justice and the social context within which it prevails. Available literature provides some insight on this issue (Miller, 1979; Forder et al., 1984), and one can also examine the evidence of history. For instance, Aristotle's concept of distributive justice centred on the allocation of honours and offices among "free citizens." But his vision of justice was compatible with slavery, as long as each person, including the slave, received his due (Sidorsky, 1983), and thus it conformed to the prevailing social system.

Again, an ancient formula of justice prevailed in feudalist societies based on a set of individual rights attributed to privileged strata. Entitlement to these rights was delimited by the following ethical principle: a person, entitled to a right, was expected to distribute any surplus above what was needed to maintain his status. The disbursement of surplus was intended to sustain needy persons and the institution of the church (Frankena, 1962; Forder et al., 1984). Clearly, this concept of justice had an additional function: it maintained the prevailing status quo.

In contemporary systems, one encounters other evidence of the social and ideological origins of the different conceptions of social justice. For instance, in accordance with capitalist ideology, which assumes that the free economic market

is capable of promoting both individual choice and economic growth, neoclassical theory alleges that the capitalist market system is capable of achieving social justice, through a distribution based upon merit. This conceptualization concedes, however, that some distortions may ensue, but alleges that these are due to intervening factors such as individual deficiencies or unfavourable social factors. Such distortions would be tackled through complementary welfare measures (Forder et al., 1984). Thus it is alleged that the neoclassical conception of justice retains its validity.

Implications of a Sociological Conceptualization

Adherents of a realistic and a sociologically relevant scenario of man's existence prior to the formation of social groupings would not concede Hobbes' (and the natural rights doctrine's) claim that man had an "absolute right to all things." It would not be feasible sociologically to speak of the existence of "rights" in a state of nature; for in fact the concepts of "rights" and of correlated "duties" are mere social constructs which could not have existed prior to the formation of communities (Matson, 1984).

Moreover, we have serious reservations concerning the alleged absolute freedom which man was supposed to have enjoyed in the so-called "state of nature." It would be more probable to expect that man never enjoyed absolute freedom, and that he had to contend with unbridled natural forces, and with both human and animal brute force.

The sociological scenario continues with man realizing that it would be in his interest to reach an agreement with his fellow men, to live a communal life. This necessitated man giving up his "normless existence" and abiding by a "community covenant." With the formation of the first community and its social covenant, an important sociological concept came into being: man agreed to reciprocate with his fellow men; and thus "reciprocity" became an important pillar of community life.

Reciprocity had important connotations: it meant mutual recognition; mutual acknowledgement of personal worth, dignity, and well-being; an interchange of goods and services; and the recognition of reciprocal interests. Reciprocal relations within each community were regulated by a set of principles derived from its nature and the features of life within it.

Eventually power, and the misuse of power, became a variable which had to be contended with. Unavoidably, reciprocity between individuals or groups, or between them and the state, suffered. The need was felt to affirm and to ensure man's status and well-being in the community, and eventually each community coined a set of principles derived from its own values, traditions, and societal expectations to regulate relations, and to guarantee some form of justice within it.

Thus, human experience and the complexities of human existence in each society, under different historical conditions and in interaction with various ideological responses, have generated several conceptions of social justice. Implicit in

each of them is some ideological bias determined by "what is appropriate to different forms of societies" (Miller, 1979).

A point worth mentioning at this stage is the extreme stance taken by some of the proponents of the conventionalist theory. They allege that "there are no basic moral principles that apply to everyone," and that principles of justice are determined through moral bargaining (Harman, 1983). However, a realistic interpretation would refute this view. Though it would be legitimate to claim that each society has its own set of moral principles, including its characteristic version of social justice, one should not ignore the impact of accumulated human experience, and the influence exerted by the international community on its state-members. In fact, one may claim that through international consensus a set of universal ethical principles have been formulated (Donnelly, 1985).

The scope of these universal ethical principles has broadened over the years, through an interchange of human experience, and has materialized in numerous United Nations declarations on human rights.

An analysis of the content of these rights reveals a shared common goal: to develop man's abilities and to ensure that he can become, rather than a dependent recipient, a self-controlling, self-developing agent, who can relate to others and reciprocate on the basis of mutual respect and co-operation. Even when the rights provide positive assistance, the ultimate goal is not to reinforce dependence, but rather to give support to enable the individual to become an agent, able to control his own life and to pursue his own purpose (Gewirth, 1984).

This, in our view, is the ultimate goal of any policy which claims to achieve social justice. It is the yardstick by which every policy should be measured.

In the meantime, variations and controversies exist concerning the criteria to be adopted for the distribution of goods in accordance with the precepts of social justice.

Criteria of Social Justice

Various considerations of a cultural, ideological and practical nature have contributed to the formulation of a broad spectrum of policies which profess to guarantee social justice. However, there is a common denominator which is generally accepted by the different approaches.

There is general consensus that justice is based on both formal and substantive criteria. To these two dimensions we propose a third consideration, namely "executive justice," i.e. justice in the execution and the application of policies.

A short résumé of the three dimensions of justice is in order here.

FORMAL JUSTICE

Formal justice provides guidelines to be observed in the ordering of human relations. These may be summed up as principles of impartiality and equality of consideration. Thus the core of formal justice is the exclusion of arbitrariness (Gins-

berg, 1965). An important derivative of this principle is the provision of stability and predictability in the social order. Noteworthy in this context is the fact that these principles sometimes go unheeded, because of the misconceived belief that their sacrifice is necessary to "revolutionize life" and to achieve development.

SUBSTANTIVE JUSTICE

Substantive justice provides guidelines for the provision of the content of policies that seek to achieve social justice. Aristotle's concept of proportional justice is still valid: "Equals should be treated equally, and unequals unequally."

Moreover, it is generally conceded that the formula for a just disbursement of the common goods should be based on an appropriate synthesis of two criteria: desert and need (Hobhouse, 1965). The application of this principle is a controversial issue, influenced by ideological, cultural, and practical differences, and the subject obviously extends beyond the scope of this study. But, in general terms, *desert* denotes a relationship between an individual and his activity, on the one hand, and a suitable reward that is considered appropriate, according to our appraisal of his activity, on the other (Miller, 1979).

Broadly speaking, the criterion for entitlement to a reward is determined by the nature of the activity in question. In the case of a job, desert would depend on the ability to do it. In the case of education, desert is based on academic performance. Economic desert raises serious difficulties, though as a general principle it should be based on the portion of the value that each individual, through his efforts, skill and abilities, has contributed to the common stock of society (Miller, 1979).

Quite often the disbursement of goods or rewards takes account of needs in addition to desert. For instance, wage systems often take into account the variations in the price index and the rates of inflation. Minimum wages for jobs that require low skills or none take into account both criteria (Benn and Peters, 1966).

The importance of *needs* as a criterion of substantive justice rests on an initial basic principle: the human worth of all persons is equal, however unequal may be their merit (Vlastos, 1962). However, the literature on this issue reveals a wide range of controversy, especially concerning the level of needs that a just society is obliged to satisfy in accordance with the postulates of justice.

A traditional view related to capitalist ideology requires the provision of a minimum standard of living and of welfare services. Desert as a criterion for distribution comes into play above the social minimum (Boulding, 1962). Various writers express dissatisfaction with this view, and propose alternative criteria, such as the satisfaction of "all genuine needs" (Runciman, 1967), or "appropriate opportunities" for the satisfaction of needs (Benn and Peters, 1966), or a "mean average level of welfare" for all, followed by an equal share of maximum welfare measures (Weale, 1978). Meanwhile, those who have been influenced by socialist thought call for positive discrimination in favour of the underprivileged (Pinker, 1976).

At this stage, we would like to remind the reader of our previous discussion of the sociological nature of reciprocal relationships within society, and of the de-

mands of social justice. We hold the view that the satisfaction of individual needs entails the provision of what is required for the full development of man's potential (Ginsberg, 1965; Donnelly, 1985), enabling him to control his own life and to pursue his own purposes.

One relevant question is the stage of an individual's life at which distribution should be made. The "starting-gate" theory proposes that each individual should start at the same point in life with an equal amount of resources (Narveson, 1983). Any disparity after that is considered just. Dworkin opposes this view and calls for an ongoing redistribution on the basis of compensating the unequal (less talented or handicapped). For this purpose he proposes the levy of an income tax (Narveson, 1983). The same line of thought had been propagated by Titmuss (1968): redistribution should guarantee equality and security with regard to life chances throughout an individual's life.

Another point of relevance to third-world countries concerns the situation in which a country has limited resources that do not permit the satisfaction of all individual needs. Proposed solutions differ according to ideological commitment. One view calls for an equal distribution of risks (Weale, 1978), whereas Hobhouse (1965) offers a more moderate formula:

- As a principle, all share in the common good, and consequently should also share the limitations of resources.
- Where necessities are short, superfluities must vanish.
- No amount of unnecessary comfort can justify the deprivation of necessities, even in a single case.

At the opposite extreme are those who advocate positive discrimination in favour of the underprivileged (Rawls, 1985; Pinker, 1976). This latter view seems to us justifiable in cases where such discrimination is required for the full development of man's potentialities, as well as for the satisfaction of his basic needs.

EXECUTIVE JUSTICE

Traditionally, social justice has been identified as having two components – a formal and a substantive one. A policy which fulfils the requirements of the two components is considered to have met the terms of social justice.

However, the question of the application or execution of such a policy, with all its administrative nuances and interventions, has not attracted the attention of theorists of social justice, though it has been picked up by writers concerned with social administration, and has been treated as an issue related to the practical and administrative implementation of policies.

In-between the two approaches – that of the theorists of social justice and that of the social administrators – fall cases in which the executive intervenes to change, totally or partially, the features of social policy. For this reason, we believe that the concept of social justice involves a third component, in addition to the formal and substantive elements. With the completion of the executive phase, the structure of the policy materializes and takes its final form.

During the executive phase, the substantive policy may be adulterated, im-

peded, or changed in many ways. Causes include inefficiency, sloppiness, or red tape. But in each case the delivery of a right, a benefit, or a service may be impeded.

More serious are the covert strategies that politicians and/or administrators adopt to change or adulterate official policies. These intentional interventions may affect the formal and/or the substantive components of the policy. The practical issues involved in such cases have been studied and discussed by Scrivens (Doron, 1983). Several patterns of intervention may occur.

Selective Implementation

The policy may be declared to have universal application, but several reasons may be given for delimiting its implementation geographically. For instance, the responsible administration may claim that a gradual application would be more efficient; or that resources put limitations on the universal application of the system; or that the application is more urgently needed in certain sectors of the country, for instance where there is greater population density. Another selective method which is often adopted is to give the local administrative authority a discretionary power to determine which cases require aid. Often the individual has no means of disputing a negative decision.

Strategies Designed to Reduce Demand

Scrivens calls these demand inhibitors. The most common methods are deterrence, denial, and withdrawal of information. Deterrent methods may impose some direct or indirect form of stigma on those who are entitled to a benefit or a service. In other cases, unsuitable conditions such as badly equipped offices, inconvenient hours, long queues, waiting lists, unfriendly personnel, etc., all contribute to deter the beneficiaries from requesting what they are entitled to. Authorities may deny that there is a need for the service, or may pretend that what the applicant requests falls under the jurisdiction of another department.

Quite often a right to a service or a benefit is not widely advertised, and beneficiaries may be unaware that they are entitled to it. Red tape may also be adopted as a tactical means of limiting delivery.

Strategies to Reduce Supply

These are referred to by Scrivens as supply inhibitors. Among the methods are the use of the administration's discretionary power to turn down applications, or to draw up long waiting lists. In other cases the quantity or the quality of the service may be diluted. Charging a fee for the delivery of the service is a free-market concept to decrease demand. Other means such as limited or inadequate staff, disregarding the complaints of the client, and premature termination of care are also designed to reduce supply and entitlement to the services.