

Society and the Future

Futures Research Programme, 2005-2008

The mission of the Institute for Futures Studies is the pursuit of research aimed at encouraging a broad and open debate on significant future threats to and opportunities for societal development. The Institute builds its activities on research programmes extending over four to six-year periods. The programme described below is entitled *Society and the Future* and will run from 2005 to 2008 inclusive. It is the fifth in the Institute's series of research programmes.

The programme offers both continuity and change. The new initiatives that the Institute is launching in this field derive from a need to collect and extend our knowledge concerning actual developments in our public institutions and how structural change and reforms are affecting people's welfare, in terms both of resource distribution and of the citizen's room for manoeuvre, particularly from a gender perspective. A key assumption in this respect is that futures research can be enriched by the more systematic adoption of an institutional perspective. Special importance will be attached in this report to the study of social marginalisation processes and the long-term consequences of childhood conditions. There will also be greater emphasis on international comparisons, as well as on European integration and global migration.

The studies of demographic futures launched during the previous programme period will continue, but with different thematic divisions, and there will be greater emphasis on the relationship between overall structural processes and institutional change. This will also apply to further studies of regional transition.

Below, we will begin by describing the basic perspective that has shaped the programme framework and then outline the various research themes. This will be followed by three sections setting out general considerations relating to methodology and organisation, collaboration with specialists in other fields, and forms of external dialogue.

Society and the Future

Like society today, tomorrow's society will be a result of individual and collective actions and their cumulative impact. Public institutions such as the market, the state and the family affect the way we act via a combination of factors such as resource distribution, incentives, norms and habits. That such factors are affected by changes in the world around us scarcely needs to be said. Society changes when people's behaviour changes and when our rule systems change.

A fundamental reflection in relation to futures studies is that the development of society is not easily predicted. This is partly because social research does not generate sufficiently strong links to make firm predictions possible, but also because such studies have an impact on the research object itself. Human beings are action-oriented creatures who respond to what goes on around them, including the future scenarios produced by social researchers and other actors. Thus a forecast may undermine its own claim to predict events should people find it undesirable. We arrive at individual and collective decisions through which we constantly reassess and reshape community life. This applies to all areas, from markets to politics. Decisions at the micro level can have a major impact at the macro level.

We understand some matters better than others, however. One thing we know is that our demographic structure is going to produce an ageing society. Another is that the changes that take place in society are significantly affected by institutional arrangements and regulatory frameworks already in place. It could also be argued that there are some areas in which reasonably accurate predictions are essential. This is true, for instance, of key public and private institutions such as the pension system, the tax system and the healthcare service, but also of legislation concerning right of ownership. Long-term policy decisions are needed to secure individual welfare. Here, institutional theory provides a valuable addition to demographic research. Also, the tension field between demographic structure and institutions is an important area where systematic research can help clarify the options in the democratic discourse about our future. The ageing of the community presents a number of special problems requiring consideration. One key issue is the relationship between demography and resource distribution; as the population ages, demands for more extensive redistribution can be anticipated. This applies irrespective of whether the aim is to solve the redistribution problem by means of the market, the state, the third sector or the family. There is reason to suppose that the way future society shapes its institutions will have an impact both on social equality and on economic efficiency and growth.

The programme title reflects an ambition to outline the opportunities and limitations that will inform the way we shape tomorrow's society. Ultimately, it is a question of building up our store of knowledge so that we are able to identify viable courses of action. Also, however, the title emphasises the fact that the Institute's core activities are rooted in the social sciences. By comparing developments in Sweden with developments in other countries, we can distinguish and evaluate different courses of action. Here, the Institute's current research offers a natural starting point, but if we are to progress further we must recruit new staff and apply fresh theoretical approaches. In recent years, the institutional perspective has steadily grown in importance in the social science field – particularly in sociology, economics and political science, but also in economic history and geography. The relationship between demographic trends and institutional change in society pervades all the research themes outlined below.

The term institution is used differently in different disciplines. Most researchers, however, take it to mean a set of laws and norms whose purpose is to organise various forms of social activity. Examples include public and private pension schemes, the healthcare service, and the rules surrounding economic activity. For the pursuit of futures studies, institutional perspectives are useful, partly because institutions in themselves constitute inertial factors and partly because these perspectives set limits for what may be deemed feasible. In social science, the term 'institutional path dependency' is often used in this connection, meaning that past decisions systematically impose restrictions on future choices. Thus it could be argued that in certain important respects our future is written in the history of our public institutions.

A term that is used with increasing frequency in the social sciences is regimes or regime types. This term is useful in that it encapsulates institution-building across wider areas; or put in another way, it encompasses a wider range of institutions and programmes. In the social policy field, therefore, reference is made to welfare regimes, while the term production regimes, for instance, is used in the employment policy field. Regimes may be established at both national and international level. At the international level, they may involve regional – such as European – or global regimes. In addition, regimes may embrace different levels in regulatory frameworks, which creates problems the various levels are not properly coordinated.

Ultimately, the regime perspective concerns itself with how we organise the modern market economy and our public institutions. In the case of production regimes, it is about how we organise both the labour market and the production of goods and services. Applied to the welfare state, it is about the redistribution of production outcome, but also about conditions for human capital formation and how human resources are utilised in production and reproduction. The way the welfare state is designed affects both the scope for and interaction with other welfare practices based on the family and the market. This is one of the reasons why a distinction is usually made between different models of 'welfare capitalism'. In general, however, research has tended to focus on regimes in a single area, such as the welfare state, the education system, migration policy or employment and production. Integrating these different perspectives is no easy matter, but in view of the studies currently planned at the Institute there would appear to be a good prospect of success in this regard.

There is still only a limited awareness of what has happened to our institutions. It is important, therefore to examine the changes that have taken place both in specific institutions and in overall regimes. Experience shows that failure to adopt an overview of common trends and sectoral differences makes it difficult to assess how individual systems develop as well. We must also learn more about the engines of change and the stumbling blocks. A significant knowledge gap in this respect is the lack of proper analysis of the implications of change, in relation both to economic growth and to democratic policymaking and human welfare.

As part of the *Society and the Future* programme, we will also be placing emphasis on the impact of European integration on the public institutions under review. More and more areas must be brought into a European context, and we must look at the way ideas and strategies are spread from one country to another. Not only the European Union but also other international organisations are important in this respect. New policies are not always initiated at the national level. EU enlargement represents a formidable challenge for social researchers. Where migration is concerned, different sets of international regulations will need to be considered simultaneously. A strong link exists between international regulations and problems such as lack of integration and marginalisation processes found at the national and local level. Also, the migration issue shows that analyses of change in society should be expanded not only in an east-westerly direction but also in a north-southerly direction.

Activity in the research programme for 2000-2004, *Shaping the Future: Demography and Democracy in the Twenty-First Century*, has been vigorous and productive. The issues dealt with and the studies published have not only been of great importance for Sweden's future and the domestic discourse but have also aroused considerable interest abroad. In the process, the researchers who have worked at the Institute have acquired an in-depth understanding of methodological concerns relating to futures studies. Demographic investigations have discussed family building, migration, the labour market and distribution issues. By adopting a spatial perspective, the researchers have acquired a closer understanding of regional development processes. Other priority areas in the programme were the position of children in an ageing economy, and the challenge of gender equality – not least for Europe. Thematic integration resulted in fruitful cooperation. The focus on these areas, therefore, will be maintained. This will ensure a significant level of continuity and enable the Institute both to make good use of the skills that have been built up in recent years and to develop them further. The new projects recently initiated involve the more systematic application of an institutional perspective. Several projects serve to illustrate this. The relationship between demographic trends and macro economic policies is one, and the importance of social policy

for reproduction (childbearing and upbringing) from a gender perspective another. The EU-sponsored projects concerning 'sustainable social policy' that we have been involved in and our work on global migration issues may all be viewed as attempts to test the advisability of combining studies of overarching structural process with analyses of the need for institutional reform. The aim of the research themes presented below is to generate new knowledge, not least by turning to account the research group's truly interdisciplinary composition and working methods.

The new programme embraces five general themes that will subsequently be defined more closely in the form of specific projects, insofar as this has not already occurred. The themes are: Citizenship and the Transformation of Welfare Institutions, Social Exclusion Processes and Childhood Conditions, Regions in Transition, Demographically Based Futures Studies, and Economic Development and Distribution in an Ageing Society. Each theme will generate additional subprojects, and closer interaction between themes and with other research environments will be a feature of the programme. External funding opportunities will be investigated. This means that we cannot know in advance which projects are financially viable, and the themes have therefore been described more openly than if all research had been undertaken with the aid of the Institute's basic funding appropriation. Collaboration is already practised internally, however, and is also developing via the researchers' extensive networks, which for reasons of space can only be mentioned briefly in the following. Current strategy is to use basic funding to finance those who are heading research into the in-depth programme themes and to let the size of the themes be contingent on how successful the researchers are in generating external funding. The bulk of the Institute's basic funding is being invested in two of the new themes: Citizenship and the Transformation of Welfare Institutions, and Social Exclusion Processes and Childhood Conditions. There, too, the research team is being urged to seek external financing so that funds can be released for further studies.

Theme 1: Citizenship and the Transformation of Welfare Institutions

This theme focuses on the transformation currently under way among the various public institutions in Sweden. In the final analysis, it concerns welfare in the broad sense, but also the legal basis of citizenship and European integration. The 1990s may be viewed as an important decade in that they helped reshape Swedish society. Here, a fruitful approach for the Institute would be to initiate further studies, but also to provide an arena for research largely undertaken elsewhere. The recruitment of researchers who are active in this field would be combined with the task of developing anthology projects involving a greater number of researchers so as to ensure both width and an overall perspective.

One of the fundamental changes to have taken place in Western society in recent centuries is the emergence of citizenship, with the broad spectrum of rights and obligations that has accompanied it. The process began with civil citizenship and the principle of equality before the law, and continued, albeit gradually, with the development of political citizenship, embracing first universal suffrage and then equal suffrage. The arrival of the welfare state may be appropriately viewed in the context of the new status or significance that citizenship acquired in the 20th century. The advent of social rights and obligations linked to people's basic upkeep marked the third step in the evolution of citizenship. These rights included both economic security systems and healthcare and social services.

A fundamental premise in this theme, however, is that welfare cannot be equated with the welfare state. A more rewarding approach is to view welfare in terms of the resources and room for manoeuvre available to the individual. Here, resources means not only income and other economic assets but also things like health, education and social acceptance in the community. Basically, it is about the conditions and relations that allow individuals to control their own lives. Thus it is clear that the welfare state is not the only welfare institution. We must also consider such institutions as the family, the business community and the third sector.

One area in which the demographic element is prominent is public and private pension insurance. This clearly illustrates the power that institutions wield over people's thoughts and actions. Throughout the 20th century, the Swedish pension system followed a specific line, a particular development path. Any changes that took place served only to maintain and reinforce the line of approach already in use. Basically, the changes that did occur were influenced by the choices made when the system was originally designed. Here, however, major changes have since occurred in Sweden that have considerable implications for the future. While the reformed national pension scheme has been a subject of much discussion, the changes that have taken place in the private sector have not attracted the same attention. This is true not least of contractual pensions under collective agreements. Due to the recent addition of new staff, however, the Institute is well equipped to adopt a cohesive approach to the matter of citizens' pensions. A comparative perspective is not only crucial to our understanding of events in Sweden but also enables us to pass on what we have learnt to an international audience.

Old-age care is another area in which demography and institutions meet. In contrast to pensions, surprisingly little has occurred here in the way of reforms, at least with regard to funding. Nevertheless, care of the elderly remains an important issue for future study, and Institute researchers are in a position to provide a well-documented factual basis for further discussions in this field.

A third area of considerable importance is healthcare. Major changes occurred in the 1990s, and although they showed clear regional variations they also involved state intervention. The poor financial situation of the county councils and the fact that care needs will increase as the population ages suggests that the pressure for change will be considerable in the years to come. During the upcoming programme period, a project will be launched to examine the ideas and strategies governing this change.

The area that is possibly of the greatest relevance from a futures research perspective is the education system. It is argued in some quarters that the solution to the pensions dilemma lies not in a reformed pension scheme but in greater investment in education and childcare so as to ensure a secure supply of productive labour for the future. During the programme period, the Institute will study the changes that have occurred in the education system, *inter alia* from a comparative perspective. For various reasons, such an analysis should go beyond the education of young people, not least because higher education has expanded in Sweden. Also, there is increasing emphasis on the need for what is termed lifelong learning. This brings vocational employment training and in-company training into the fold as well. The education system and how it relates to the labour market is also dealt with under *Economic Development and Distribution in an Ageing Society*.

In Sweden, three trends have recently become evident in the publicly financed welfare field: the privatisation of provision, the decentralisation of principal responsibility and an increase in user-financing. Hitherto, the consequences of privatisation have not been properly investigated, despite the fact that they tend to be regarded in the public discourse as the most important issue of all. Decentralisation is also high on the political agenda, one of the reasons being the appointment of a government commission to examine the question of responsibility. The fact that financing is a key issue for the future is demonstrated both by the amount of space accorded this topic in the press and by the forecasts of the Long-Term Planning Commission. User-financing in particular has been discussed in this connection. Highly qualified researchers have been recruited to look into this issue, and joint European projects have been launched.

Today, economic growth has become a key concept in the political debate. Growth is seen as the saviour of welfare in an ageing society. A special subproject will examine the political significance of growth and how this concept affects the way we view not only the state, the market and the family but also such phenomena as immigration, taxes, entrepreneurship, competition and regional development policy. Particular attention will be paid to the political parties and stakeholder organisations.

A separate project will seek to review individual rights in the development of Swedish society over the past two centuries. In discussions on democracy, it is often claimed that the individual has occupied a relatively weak position in the Swedish social order. The state, it is argued, has favoured the collective or the majority at the expense of individual or minority struggle for recognition. Over the past decade, however, interest has grown in individual rights. To some extent, this is a result of the welfare state's funding problems, but it is also due to the fact that national policies are increasingly formulated in the international arena. The European Union, for instance, is drawing up a special Charter of Fundamental Rights for its citizens. There is also an interesting tension field between individual and collective rights. How has the relationship between state and individual been defined and regulated in Swedish society at different periods and in different policy areas, and also in relation to different sections of the population?

Research Leader: Professor Åke Bergmark.

External contacts: The theme researchers collaborate extensively with the Department of History and the Swedish Institute for Social Research (SOFI) at Stockholm University, the Department of Government and the Department of Economic History at Uppsala University, Mid Sweden University, the National Institute for Working Life, and Södertörn University College, as well as with researchers abroad, particularly in the Nordic countries and other parts of Europe.

Theme 2: Social Exclusion Processes and Childhood Conditions

As a subject, childhood conditions invites a dynamic approach on the researcher's part extending beyond social relations to social change. This is also a matter of the utmost relevance for futures studies and a natural topic for an institute specialising in this field. Most importantly, we need to learn more about the various marginalisation processes, how they operate over the life course and what public institutions can do to combat social exclusion and alienation. Marginalisation and social exclusion processes tend to feature prominently in dystopian future scenarios.

In order to study childhood conditions and marginalisation, we need to identify the social factors that dictate people's opportunities in life. The classic sociological approach proceeds from the social classes in a given society. In recent years, gender-oriented research has identified gender as an important explanatory factor. Other research has focused on the fact that ethnicity, immigrant status and age have become increasingly important factors in explaining welfare gaps between citizens, both in Sweden and elsewhere. The aim of this theme is to systematically test the relevance of these perspectives in relation to the study of institutional change. If the impact on people's living condition and welfare of these background factors changes, society changes as well.

Childhood conditions are linked to the way the education system is shaped. Both parental means of support and public assistance are factors that affect how education works for the individual concerned. In general, however, research focuses either on the school or on the financial situation of families with children. However, in connection with the final report from the Swedish governmental Welfare Commission *Welfare in Sweden: The Balance Sheet for the 1990s* (SOU 2001:79) conditions for children and teenagers were studied in detail for the first time. The findings will be passed on during the upcoming programme period and be placed in an appropriate futures perspective.

On a more general level, childhood conditions could be seen as a reflection of the future, as we know that conditions during this period have an impact later in life, both in the form of direct impressions and through the choices we make when young. Given this focus on childhood conditions, the sociological perspective needs to be strengthened in the child research under way at the Institute. Child research in Sweden is fairly segregated, which suggests that the Institute could continue to serve a purpose as an arena for such studies.

The importance of addressing conditions for the young is further emphasised by the fact that adolescence and entry into adulthood have apparently remained a problem beyond the crisis years of the 1990s. Other areas of current importance requiring study from a marginalisation perspective are long-term dependence on social assistance, long-term sick leave and disability pensions.

One project that has already received most of its funding externally, from the Swedish Council for Working Life and Social Research, aims to study the work performed by children and adolescents in Sweden – both paid and unpaid, formal and informal – over five decades. Almost no research has been carried out in this field. This may be partly explained by our modern tendency to view childhood as a period free of responsibility – which helps to make child work invisible – but it is also due to the way we define work. Also, there is a popular belief that child and adolescent labour has virtually disappeared as a result of technological change, work safety laws and extended attendance at school. Children and adolescents are in a sense both excluded and superfluous. A different perception may be needed: that work

performed by this age group has not vanished but has been transformed, that we are blinded by the way work is defined. When we view children as actors, we quickly see that they perform a wide range of tasks. Gender and ethnicity are important aspects in this connection. The project, which is being jointly undertaken with Linköping University, will address the 10-19 age group and the study findings may prove useful in discussions about how child labour affects the macro economy.

Another externally financed project will analyse downward social mobility from a longitudinal perspective, which could be considered an aspect of marginalisation. Whereas intergenerational upward social mobility tends to be viewed as both a 'natural' and a desirable feature of an open, democratic society, downward mobility is often considered 'unnatural' and a result of individual failure. However, much less research has been carried out into downward mobility in the class hierarchy than into upward mobility. A key line of inquiry in this project is the extent to which factors affecting upward mobility also affect downward mobility. Although downward social mobility cannot of course be seen as a mirror image of upward mobility, the theory is that new knowledge can be gained by integrating the two perspectives more closely than has hitherto been the case. It could be argued that research into upward mobility is of greater value in view of the implications for social justice. This project, however, is based on the assumption that a cohesive understanding of intergenerational social mobility presupposes studies of processes in both directions. Besides the fact that knowledge concerning the basic causes of downward mobility is interesting in itself, insight into these causes may also reveal hitherto undiscovered reasons for why there are still major differences in people's opportunities in life that relate to their class of origin.

Research Leaders: Professor Johan Fritzell and Professor Christina Florin (for children, adolescents and labour).

External contacts: The theme researchers collaborate extensively with such bodies as the Centre for Health Equity Studies (CHESS), the Department of History, the Department of Criminology and SOFI at Stockholm University, and the 'Theme: Children' faculty at Linköping University, as well as with researchers abroad. They have also engaged in joint projects with Save the Children Sweden centring on conditions for children, and with the Centre for Epidemiology at the National Board of Health and Welfare in connection with the Status Report on Social Conditions for 2006.

Theme 3: Regions in Transition

This theme encompasses studies of the transformation of Sweden's regions and municipalities. It combines systematic institutional studies with new knowledge concerning how the country's demographic structure is developing. The primary focus is on organisational change in society, on the role of the state and on how municipalities respond to demands for greater efficiency and the development of new activities.

Building on the work undertaken in the previous research programme, we will be conducting an in-depth study into the Swedish population 2025 in a geographical future scenario. The object of this study is to learn more about how Sweden's zonal structure and thereby the country's transport requirements will develop over a 20-30 year period. The study is intended to generate supporting data that will enable policymakers and planners to bring both built-up areas and road networks into line with official sustainable development and transport policy goals. The project will examine the mechanisms behind changes in resettlement and travel

patterns. These patterns will be analysed at a detailed geographical level, and the population will be classified according to age, education, gender, occupation and type of household, etc. The project will pave the way for collaboration with researchers in the natural science field.

A key area for further study is the re-shaping of the local welfare state in terms of *network governance*, and the emphasis here will be on growth issues. Given current resettlement patterns and regional imbalances in age structure, there is a considerable risk that gaps between different parts of Sweden will widen. Institutional conditions are reinforcing this trend. Like other welfare states, the Swedish state has adopted a distinct growth-oriented policy approach. It is searching for ways to cope with welfare distribution while at the same time trying to manage the supply side of the economy, i.e. by promoting the development of niches where Sweden can compete in a more globalised economy. In state theory, this evolving area of central government activity is sometimes referred to as the *competitive state*. Does growth policy help to widen regional gaps or can it be combined with balancing measures and further redistribution policies? How does 'self-organisation' actually work in the regions? Significant knowledge gaps exist in this respect.

Another area requiring in-depth study is the evolution of a new municipal system. The forms for state governance are also undergoing change. In addition to its role as a sovereign lawmaker, central government is now acting as an organiser of 'self-organisation'. This is one result of the drive for a regional innovation system where the role of the state is to persuade various actors to organise for growth. Here, the state could perhaps be described as a network entrepreneur. Another example concerns the relationship between central and local government. Although the country's municipalities are finding it increasingly difficult to meet their obligations and are perceived as small and fragmented, the state is not prepared to reorganise them into larger units once again. Instead, it is advocating inter-municipal cooperation and is actively promoting moves whereby the municipalities, too, would be transformed from administrators of public services into proactive, network-based growth institutions. In this connection, specific projects centring on 'the emergence of a new municipal system' and 'the impact of inter-municipal collaboration on local self-government' have been developed and granted external funding.

Research Leader: Professor Erik Westholm.

External contacts: The theme researchers collaborate with Dalarna University College, the Department of Social and Economic Geography at Uppsala University, the Department of Social and Political Sciences at Örebro University, and Södertörn University College. The research group has developed projects and partnerships with the Swedish Association of Local Authorities and with both the Committee on Public Sector Responsibilities and the Regional Growth Committee. Internationally, the researchers are affiliated to European networks on futures studies.

Theme 4: Demographically Based Futures Studies

No field of study in the social sciences has been so widely applied in the analysis of future development trends as demography. Most developed countries publish national population forecasts extending 50 years into the future. In addition, research institutes around the world produce forecasts for smaller or larger areas. Over the past 10 years, realisation has grown that population forecasts represent an important source of information when we seek to determine future trends in the social and economic spheres. This in turn is the result of a breakthrough in our understanding of how changes in mortality, fertility, migration and age structures affect the way societies develop. Work on demographically based futures studies has been under way at the Institute since the late 1990s. Areas reviewed include the demographic effects of economic development, environmental consequences, and the consequences for different types of welfare systems. Studies undertaken at the Institute have focused on Swedish, European and global prospects for the future. Another important task has been the development of an international network of researchers and institutions focusing on the socioeconomic implications of demographic change.

A key issue under this research theme in 2005-2008 will be the environmental consequences of the rapid growth in global income anticipated over the next few decades. The Institute's researchers are developing a major research programme in this field and will be seeking to fund it by external means. Another area in which demographically based futures studies can have a significant impact is Africa. If current demographic trends persist, the future looks bleak for many African countries. Determined efforts to reduce mortality, however, could reverse the trends. Better health and education could reasonably be expected to reduce the fertility rate and thus the burden of dependency. An analysis of alternative future scenarios for Africa, therefore, would represent a valuable basis for policy discussions, both in the African countries concerned and within the international community. Various African countries have already expressed an interest in such a study. Further work in this field is scheduled in collaboration with Professor David Bloom's research group at the Harvard School of Public Health.

A basic premise of demographically based futures studies is that certain demographic trends are more or less impossible to influence in the short and medium terms. In the longer term, however, something can definitely be done. Research into ways in which policy decisions can influence demographic trends, therefore, should be viewed as an integral part of demographic futures studies. So should further analysis of the economic implications of demographic change. Here, three areas are deemed of particular interest. (1) The correlation between conditions in the housing market and opportunities for starting a family, from both a Swedish and a European viewpoint. (2) A better understanding of how migration processes affect social structures and income distribution at arrival and departure points. (3) Analyses of how changes in incentives and health affect people's economic life cycles. Progress in these research fields is contingent on access to good data and efficient tools for managing such information. Maintaining our current level of demographic competence is a matter of strategic importance to the Institute. Fertility is in itself a vital issue for the future. The prospects for collaboration with the Demography Unit at Stockholm University are good, based *inter alia* on our joint research applications with Professor Elisabeth Thompson.

The Institute's approach to the migration issue is a groundbreaking one. Much of the preparatory work has been completed and swift progress should be possible over the next few years. The same is true of studies focusing on the economic returns of health improvement. One of the projects under this theme deals with the economic effects of population movement,

particularly the question of whether there is a link between domestic and international migration and changes in income structures both in sender regions and in recipient regions. International research on the economic effects of migration furnishes a background to this study. In terms of direct impact on the pay of domestic wage-earners, only very limited effects have been noted or none at all. However, there has been some debate over results suggesting that migration does have some indirect effects on pay structures and income dispersion.

In connection with this theme, the project jointly initiated by the Institute and a network of researchers concerning reform of the global regulatory system governing international migration is to continue. This should be seen as an attempt to further the study of population changes and their impact on institutional frameworks. Ultimately, this is about institutional change, about how national and international regulations may be adapted to current and future conditions, which are very different to those that prevailed half a century ago when the regulations were introduced. It is also about fundamental welfare issues such as how the lives and health of refugees and other resettled groups can be protected under national and international law. One particular project will focus on migration in the aftermath of EU enlargement in 2004. A further project for which we have sought European Commission funding concerns the study of how increased global migration is likely to affect the EU in foreign policy terms.

Research Leader: Professor Bo Malmberg.

External contacts: Besides the persons and institutions mentioned above, the theme researchers collaborate with (or are formally associated with) the Department of Cultural Geography at Stockholm University, the Department of Social and Economic Geography at Uppsala University, the Global Commission on International Migration in Geneva, and the Hamburg Institute for International Economics.

Theme 5: Economic Development and Intergenerational Distribution in an Ageing Society

The starting point for this theme is the ageing population of Western society. Here, the key question for the future is what this trend will mean for the redistribution of resources among young people, adults of working age and old-age pensioners. The aim is to arrive at a closer understanding of how private and public welfare systems interact with distribution and growth when changes occur in the population's age structure. At present, we know too little about how productivity growth and employment are affected. The empirical knowledge available to us strongly suggests that ageing leads to a downturn in the productivity curve, but the interaction between the various mechanisms that conceivably cause this is a largely unexplored field of inquiry. We know far too little, for instance, about how these mechanisms might be influenced by actions or initiatives in, say, education.

New research has identified equality and distribution as vital factors in the growth process, and has also found that both fertility and education have important but partially conflicting roles to play as agents in this respect. Some key areas that could improve our understanding of the interplay between opposing forces are the employment market, the financial markets, social insurance and the education system. In these areas, too, demography has a leading (but underrated) role to play, while at the same time it is one of the few things that allows us to make predictions extending for decades into the future with any degree of certainty. In policy terms, investment in the training of future labour has to be weighed against the requirements of an ageing population. Both labour market adjustment to new demand patterns and the

incentives for labour force participation that are present in social insurance schemes are important components that need to be weighed against long-term population trends and immigration.

The birth of a child also marks the arrival of a future member of the workforce. This 'human capital' is subsequently fostered by parental care, education and personal experience, all of which occur largely outside the market. New financial markets are offering private social security options, and too little is known at present about the correlation with public social insurance and education. The importance of collectively agreed systems, for instance, deserves closer analysis. The ways in which private and public social security and distribution mechanisms interact has never been clearly established, particularly in totally new circumstances where extensive redistribution is required if new inequalities are to be avoided.

Sweden's unusually favourable data situation should help us improve our understanding of the above mechanisms. By exploiting opportunities to link register data at various levels to enterprises and individuals, we can enhance our knowledge of the interplay between birth cohorts of various sizes and varying levels of education. Using this tool, we can also analyse how the various cohorts interact with the labour market and also gauge the effects both on individual income growth and productivity growth in enterprise. Moreover, this type of linked data can be further linked to social insurance registers of various kinds, thereby enabling us to assess directly how productive social policy is in practice, something that has not previously been possible.

Building on the international networks for age-related research that were established during earlier programme periods, we will seek to generate comparative research based on this type of data and develop issues that can further support comparative research efforts in the social policy field undertaken by those working on other research themes.

During the programme period, the aim is to build up a simulation model that will enable us to better assess the various social policy choices and their implications. When applying such a long-term perspective, it is essential that we adopt a broader perspective than usual and embrace the question of how people's employment and education choices relate to financial markets, housing, resettlement, family building, and changes in both the production system and social insurance.

This theme is already guaranteed a satisfactory level of external financing for the studies outlined above due to a major appropriation from the Swedish Research Council and programme funding from the Swedish Council for Working Life and Research. Also, two further projects will be financed in 2005 by appropriations from the Institute for Labour Market Policy Evaluation.

Research Leader: Professor Thomas Lindh.

External contacts: The research team is involved in an EU-sponsored joint programme with the Institut fur Demographie in Vienna. Besides close network partnerships with international cutting-edge researchers, the team collaborates with such institutions as the Department of Economics at Stockholm University, the Department of Economics at Uppsala University, the Demography Unit and the Department of Sociology at Stockholm University, the Riksbank and Statistics Sweden.

Method, data and organisation

Access to databases of different kinds and the use of sophisticated methods are crucial to the accomplishment of the research tasks set out above. Steady progress is being made in this respect in the social science field. In addition, the Institute is naturally interested in monitoring and developing methods for futures studies. A key theme that frequently crops up both in current research and in planning for future research programmes is macro and micro analysis in combination. Some brief examples of this are given below. It should be emphasised, however, that the Institute does not have the resources to act as a centre for method development. New methods are used when they contribute to a better understanding of the matters in hand. The Institute's demographically based research into population growth and the macro economy is a good illustration of this.

The consequences of various institutional and structural changes can and should be studied at the individual level, both in terms of people's circumstances and their room for manoeuvre. The Institute has been engaged for some time in an interesting programme involving the construction of micro databases. Together with both the Comprehensive Health Enhancement Support System (CHESS) at Stockholm University and the Karolinska Institute, it has placed a substantial order with Statistics Sweden for the updating of a number of micro databases that were analysed in the course of work on the government report, *Welfare in Sweden: The Balance Sheet for the 1990s*. At the same time, the Institute's databases are being updated. This will give us plenty of opportunities to test theories empirically. To do so, however, we need to recruit researchers who are familiar with this type of material and this type of analysis.

One way of studying the effects of institutional or other contextual factors is to use multi-layer analyses. A researcher might, for instance, want to analyse the impact of housing segregation on people's situations and actions, in addition to factors ascribable to the individual and the family. The multi-layer approach can also help sharpen the focus when differences between countries are examined. How does the structure of our taxes and grants system affect people's attitudes to gainful employment, in addition to the individual characteristics that we already know to be co-variables? For decades, demographic researchers have been using what are termed hazard regression models to analyse risk factors relating to such things as mortality. This analytical technique places considerable demands on data availability, and as these demands have gradually been met it has come to be used more widely in other research areas as well. Several of the areas outlined above could be analysed using this method.

What are known as dissemination processes are also important in futures studies. New network-oriented research has proved valuable in helping us to understand apparently disparate phenomena in society, from the spread of social problems and infectious disease to membership trends in political parties and the use of new technology.

The methods used in futures studies naturally constitute a separate field of their own. The areas that come under the heading of 'futures studies' are many in number and diverse in content, and the same is true of the methods used. Despite attempts in this direction – not least at the Institute itself – there is still a lack of proper forums in which method-related issues can be discussed. Given the contacts that have been established at both the national and international level in recent years, however, the prospects for new initiatives in this area would appear to have improved. National responsibility for encouraging method discussion could be said to lie with the Institute, but we must also improve our own work in this field by assimilating methodological advances of relevance to futures studies in the broad sense. There are also a number of links here with basic issues of scientific theory. Ideally, the Institute could act as an arena and point of contact for national method development in the futures studies field. In this connection, an interesting development effort is currently under way among government bodies that deserves to be discussed more widely. It includes work on stochastic prediction models.

The Institute's researchers are also involved in a number of networks relating to futures studies. These include a COST Action network sponsored by the EU and collaboration at European level on a series of conferences centring on futures studies, where the Institute plays an active part. A project entitled *Unexpected Futures* raises both methodological issues and questions of substance, and during the first year of the programme period will result both in a theme issue of the Institute's journal, *Framtider*, and in a series entitled *Framtidsfokus* (see below).

Bearing in mind the Institute's size and the demands for scientific quality imposed on us, we must see to it that our research leaders are highly skilled. This is the case today. Their competence represents a solid base on which to build the in-depth research into set themes that is the subject of the current programme. Our aim is for the teams to be comprised principally of researchers holding PhDs and for projects to be led primarily by associate professors or readers. A further aim should be to recruit cutting-edge researchers on a part-time basis. This represents our best chance of persuading established researchers with full-time appointments to work for the Institute as well. A part-time contribution on their part would be of considerable value to us. It would also give us direct contact and a broader interface with the rest of the research community, as researchers of this type often act as hubs in networks of various kinds, at both national and international level. This would not, however, satisfy the need for competent research leaders to head the new activities in the programme. Consequently, we have found it important to recruit additional research leaders.

A further matter of importance to us is the need to make good use of the international and national networks to which the Institute's researchers belong. In this connection, there are interesting opportunities for recruiting people to work with the research areas outlined above. The ongoing integration of Institute researchers into outside networks is a sound development but needs to be expanded. Researchers in other countries are showing considerable interest in the work we do, and we will need to examine our priorities for financial reasons. The Institute is currently seeking external financing from both Nordic and European research funding sources. The international networks are also concerned in various ways.

The new research programme will necessitate changes in our organisational set-up. Given the aims and ambitions described here concerning our forthcoming activities and parameters, and given the various restrictions imposed on these activities, the Institute executive, and ultimately its Director, will have a complex organisation under their charge. To establish

viable procedures, changes will be made in our working methods when the new programme enters into force. In the case of our external activities, improvements have already been introduced (see below).

Collaboration with researchers in other fields, etc

In view of the limited resources at its disposal, the Institute naturally cannot embrace all disciplines and future-related issues in its core activities. Planning and further priorities are essential if we are to retain our breadth of perspective. One way of ensuring this is to seek collaboration with external researchers specialising in scientific and technical subjects in particular. Various approaches should be used in this respect. One aim should be to seek out areas where natural science and social science are innately linked, e.g. climate change and social insurance (see *Framtider* 3/2003). Another step in this direction is the work being done with Professor Arne Järnelöv in the *Unexpected Futures* project, which will generate an issue of *Framtider* and also a series of *Framtidsfokus* ('Focus on the Future') conferences/hearings. The themes raised here will open the way to interesting interdisciplinary perspectives and joint efforts in the fields of environment, genetics, demography, international politics and IT.

With a view to deepening their collaboration with scientists and engineers, the Institute's researchers are seeking funding for projects aimed at bringing environmental concerns into the demographic issue. Human behaviour and environmental impact is another interface between social science and natural science, not least in relation to energy matters. Genetic research addresses behavioural issues to varying extents. In this connection, it is also worth noting that genetic research on plants is potentially of considerable relevance for energy production, and thus for the climate, while at the same time ethical considerations relating to this research practice are a matter of general debate. In this field, the Institute has communicated with both researchers and industry representatives.

The Institute is also continuing its collaboration with the 'second' *Swedish Technology Foresight* project. In 2005, this will result in a joint *Framtidsfokus* conference. The regional processes under way as part of the 'foresight' project are another area in which it may prove possible to extend collaboration with engineers and natural scientists. Our aim is for the Institute to become established as a forum or meeting point for research in other areas besides those covered by our own core activities. A number of joint seminars with other organisations and enterprises are planned, and additional partners for further future-oriented events of this kind would appear easy to find. If we are to broaden our base without jeopardising quality, however, we must plan in the long term, not least with regard to outreach activities such as conferences and seminars. Outreach activities should preferably be linked to written production, as our activities should be based on well-documented scientific learning.

The Institute's researchers actively collaborate in a number of different national and international networks, which is to our advantage. The Institute has also been invited to engage in direct collaboration with other research institutes, and has taken initiatives of its own in this respect. This applies at the international level as well, where the Institute is planning seminars with French, Chinese and Russian researchers in 2005.

External dialogue: Quality, commitment and responsibility

The Institute's task is to encourage discussion of the future. If in the performance of this task our object is more rational decision-making at the various levels in society, our activities must be such that they enable researchers to act in both the scientific and the public arena to the

best of their ability. In pursuit of this goal, all projects at the Institute are equipped with information plans. External activities are directed both at the general public and at target groups of key strategic importance. Particular attention is paid to the youth perspective. The methods employed are designed to reflect this ambition. The pillars on which the Institute's external activities are based are: the quarterly journal *Framtider*, the Institute website, www.framtidsstudier.se, half-day conferences for both the general public and experts under the 'Framtidsfokus' heading, scientific seminars organised by the Institute, and talks, articles and interviews with or by the Institute's researchers. Information gathering and dissemination is a priority task for the Institute's administrative staff. Since the autumn of 2004, the Institute librarian, Hannah Zakrisson, has worked part-time with communication and media relations. Sabina Nilsson devotes half of her worktime to *Framtider* and the website, and Helena Rantanikunen (replacing Eva Brömsegård in June 2005) half of her time to outreach conferences and seminars. Ann-Marie Henriksson at the reception desk channels inquiries from the general public to the staff concerned.

Our quarterly journal, *Framtider*, is of strategic importance as it represents an interface with the general public, both for those working at the Institute and for outside researchers. It mirrors both the core issues being studied at the Institute and issues dealt with in other fields and by other disciplines. The journal is distributed free of charge to libraries and upper secondary schools, etc, but also has paying subscribers. It is published in full as a PDF file on the Institute website. The journal is a quality publication that is well received by its readers, and there is every reason to continue publishing it. Also, there is no other journal in this category in Sweden. By publishing selected issues in English, we are also able to disseminate our findings abroad.

The Institute's website, www.framtidsstudier.se, has developed favourably over the years and become increasingly proficient at reflecting our activities. With the start of the new research programme, it is now scheduled for an overhaul. The aim is to make our study findings easily accessible, and also to develop the website's potential as a forum for discussion and dialogue on future-related issues.

Framtidsfokus is a type of half-day conference that has proved successful in reaching both the general public and experts. Such events are easy to organise and attract a large number of participants. The fact that they are free of charge means that anyone can come, which also helps to broaden the dialogue. The aim is to organise about ten such conferences a year, which in practice means about one a month during termtime. Although the principal aim is to base the conferences on the studies undertaken at the Institute, the format enables us to use them as an arena for the discussion of other future-oriented topics.

The Institute applies the principle that scientific findings should primarily be examined and published in scientific forums. This is of prime importance for ensuring that research findings are reliable and also for the legitimacy of the Institute as a scientific body. In order to strengthen this area of activity during the upcoming programme period, we intend to continue our series of *Institute seminars*, both to air our own research and to communicate with other researchers and experts.

The Institute will also be involved in a number of informational activities, such as participation at the Göteborg International Book Fair and at the 'Future Days' event organised by the Swedish Riksdag in March 2005. At the latter, the Institute joined the various standing committees in producing background material and engaging speakers to open the discussions

on how Swedish society has developed over the past 18-20 years, which is the overall theme of the event. Other partners in this project included the *Bank of Sweden Tercentenary Foundation* and *Swedish Technology Foresight*.

Quality must take precedence over quantity in the Institute's work. Only sound scientific findings and carefully considered communication are relevant if Sweden's future is to be discussed rationally. A combination of documented scientific research and professional dissemination of information must continue to distinguish the work of the Institute. Such an approach sets us apart both from university institutions, which tend to lack clear-cut information strategies, and commercial futures consultants, who lack a scientific base of their own for their outreach activities. The Institute should encourage independence in its researchers as well as personal commitment and a willingness to accept responsibility. Individual members of staff should be given plenty of scope to act in the external arena. The information efforts we pursue via contact with the media, via lectures and in our work with various projects at the Institute are constantly evaluated and discussed.

Basically, our aim is to deepen and broaden the factual basis on which people can draw when discussing futures and future-related issues. A difficult task in this respect is determining which issues should be studied. An added complication is the need to consider the comparative international perspective, particularly with regard to threats and risks. The Institute staff are committed to encouraging discussion that will help the country's citizens adopt a position on the various matters before them. It is a question of deciding what shape Sweden's public institutions should take, and this involves political consideration of such matters as the relative importance of the family, the market and the state for the production and distribution of welfare.

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The research programme is to be developed and defined more specifically in project form, in collaboration with those who will be taking part. This process will necessarily mean establishing priorities and making choices, concerning not only the research issues outlined above but also the Institute's collaboration with various actors and its involvement in external activities.