

## THE INCUMBENT CRISIS OF POPULATION AGING – SECURITY IMPLICATIONS

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**Abstract.** *While aging has been on the public agenda for some years now, a quick glance towards current social practices and health policies on a global level shows a somewhat precarious management of this issue. This paper highlights current theories regarding aging and global trends in aging-related-policies, placing them in the framework of security studies. Unlike traditional types of crisis, aging represents a particular type, that of an incumbent crisis – as it is has been happening organically and can be managed – with proper policy – so that it does not become a threat to the development any given state. While demography and financial estimations can offer us plenty of insightful information, true population aging effects are ultimately social and political – how they occur and are successfully managed depends on health policies, national values, living standards and education.*

**Keywords:** *demography, incumbent crisis, security studies, aging.*

### *Global Trends in Demography*

This article examines implications and consequences of the demographic trend of aging in the framework of security and political studies, as “demographic cleavages are to the twenty-first century what class divisions were to the nineteenth century”<sup>1</sup>.

Conventionally, the term *crisis* will refer to a short-to-middle-term situation with negative effects, or a long-term publicized phenomenon affecting a large area or number of people. I use the framework of “incumbent crisis” in order to refer to any crisis which has been proven scientifically but has yet to be approached or managed properly – despite conspicuously prevailing in both time and policy.

While Italy and Japan have been dealing with this issue for some years, countries such as China and South Korea are rapidly approaching a state of demographic

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<sup>1</sup> C. Leuprecht, “Security Policies: Demographic Trends and International Security”, in *Encyclopaedia of Public Administration and Public Policy*, Third Edition, Taylor & Francis, Abingdon, 2015.

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crisis<sup>2</sup>. Security problems posed by population growth are not chiefly caused by lack of natural resources, but by discrepancies in population growth and aging; maintaining a stable political and economic state is therefore challenged by elements such as a “Disproportionate population growth in large and Muslim countries; (2) Shrinking population in the European Union and European former Soviet countries; (3) Sharply opposing age shifts between aging developed countries and youthful developing countries; and (4) Increased immigration from developing to developed countries” (Cincotta et al., 2005<sup>3</sup>; Leahy et al., 2007<sup>4</sup>; ECSP, 2009<sup>5</sup>).

Looking at the phenomenon of aging, both in Romania and at an international level, we cannot fail to observe that the increasing number of elders has repercussions on both society and economy, with deep implications when it comes to developing new policies and long-term economic plans. At dotage, social relationships become more important than ever, as the organic changes concerning health, finances and social roles are highly demanding both physically and psychologically, thus leading to an increased vulnerability and need for exterior support. Although it is traditionally considered that taking care of the old is the obligation of the young, modern families grant just a small portion of the help needed, and more and more people end up having to depend on the state, by means of pension plans, social workers or social work programs<sup>6</sup>.

Maybe one of the most debated issues in foreign policy in the past years has been that of immigrants, and their implications on receiving states. This particular discussion revolves around much more than armed conflicts, violence, human rights and cultural differences – it also highlights a certain demographic aspect: that including new ethnic groups could theoretically solve problems such as low fertility rates or population aging. As such, we can state that “any event with implications for national or global security which has an unmistakable demographic component lies within the domain of *demographic security*”<sup>7</sup>.

While longevity is a desired result of modernity, data show that by 2020 more than 25% of Europeans will be over 60<sup>8</sup>; good news as this may be, effective changes in policy are dire in terms of sustaining equilibrium in areas such as politics, health and security. While research on aging is becoming a vital component of research programs funded by the EU (as shown in the case of ASPA, LEPAS, Multilinks, SPReW or the subsection “Health, Demographic Change and Wellbeing” within the Horizon 2020 framework), more efforts are needed in order to formulate a clear picture for this phenomenon – literature is lacking in cross-national studies.

<sup>2</sup> A. Hayutin, *The implications of Global Aging & Population Trends: Economic Prosperity, National Security, and Social Well-Being*. Stanford Centre on Longevity, 2009.

<sup>3</sup> R. P. Cincotta, R. Engelman, D. Anastasion, *The Security Demographic – Population and civil conflict after the cold war*. Publication Action International, Washington, 2005.

<sup>4</sup> E. Leahy, R. Engelman, C. G. Vogel, S. Haddock, T. Preston, *The shape of things to come: Why age structure matters to a safer, more equitable world*. PAI, Washington, D. C., 2007.

<sup>5</sup> ECSP, *New Directions in Demographic Security Report*, Issue 13, 2009.

<sup>6</sup> M. C. Hokenstad, K. A. Kendall, *International Social Work Education*, in: Edwards, R. L. and Hoppes, J. G. (eds.): *Encyclopaedia of Social Work*, 19<sup>th</sup>. Edition, NASW Press, Washington, D.C., 2001.

<sup>7</sup> R. Cincotta, *The Next Steps for Environment, Population, and Security. Demographic Security Comes of Age*, 2004. Available online at [https://www.wilsoncenter.org/sites/default/files/ecspr10\\_C-cincotta.pdf](https://www.wilsoncenter.org/sites/default/files/ecspr10_C-cincotta.pdf).

<sup>8</sup> European Commission, *Population ageing in Europe – Facts, implications and policies*, Directorate-General for Research and Innovation, Socioeconomic Sciences and Humanities, 2014.

Forecasting is made difficult by immigration trends, as two scenarios become apparent: (1) immigration will lead to a larger percentage of elderly people, thus increasing the natural impact population aging has on a particular nation and its finances, (2) immigration brings a significant number of working-age individuals, therefore decreasing dependency ratios (Knickman and Snell, 2002). The potential burden an aging society might place on public finances and the medical system has represented a major public policy concern in recent years. As far as reasoning for this burden, literature tends to invoke three particular scenarios: “(a) tax rates need to be raised dramatically, (b) economic growth is retarded due to high service costs that preclude other social investments, or (c) the general well-being of future generations of workers is worse than that of current workers due to service costs and income transfers”<sup>9</sup>.

The United States is also facing declining fertility rates and an increased life expectancy, projections for 2080 mapping out a 23% 65+ cohort, compared to the 12% it occupied in 2016. Policy options discussed at a national level include reducing retirement benefits and encouraging later retirement, as people have a longer life span and extended professional activity has positive social effects (Helgerson, 2002<sup>10</sup>; Butrica, Smith and Steuerle, 2006<sup>11</sup>).

Population aging may lead to increased debt and higher taxes for the industrialized world, consequently formulating a much slower global economic growth<sup>12</sup>. China, for example, had a 88 million cohort of 65+ in 2001 and is expected to have more than 200 million retirees by 2025, which will lead to a lower average income in the aging transition; other countries, such as Afghanistan, Pakistan, Colombia, Iraq and Yemen, face the challenge of a superfluous 15-29 cohort in the 2020s; this is a major security issue, as such countries are either politically unstable or potentially politically unstable, lacking in financial resources and youth integration policies when regarding education and immersion in the workforce (CIA Report, 2001). This dynamic constitutes a security problem, as it encourages political instability, religious extremism, civil conflicts, revolts and radicalization.

One of the most important areas of discussion policy-wise is the one of successful aging, “keeping seniors disability-free and thus avoiding some of the need for long-term care” (Rowe and Kahn 1998, Knickman and Snell, 2002). Productive policy implementation in this area will lead to reducing medical-related costs for both individuals and state and reconfiguring the older generations as productive members of society. Current challenges to be met by countries with a growing elderly cohort are therefore “creating a finance system for long-term care that works, investing in healthy aging in order to achieve lower disability rates, and recharging the concept of family and the value of seniors in national culture” (Knickman and Snell, 2002).

<sup>9</sup> J. R. Knickman, E. K. Snell, “The 2030 Problem: Caring for Aging Baby Boomers”, *Health Services Research*, vol. 37, no. 4, 2002, pp. 849-884.

<sup>10</sup> J. Helgerson, *The National Security Implications of Global Demographic Change*, speech at the Denver World Affairs Council, Denver, Colorado, April 30, 2002.

<sup>11</sup> B. A. Butrica, K. E. Smith, C. E. Steuerle, *Working for a good retirement*, The Retirement Project Discussion Paper Series, 2006.

<sup>12</sup> J. Helgerson, *The National Security Implications of Global Demographic Change*, speech at the Denver World Affairs Council, Denver, Colorado, April 30, 2002.

Similarly, the European Commission recommends “(a) linking the retirement age with increases in life expectancy, (b) restricting access to early retirement schemes and other early exit pathways, (c) supporting longer working lives by providing better access to lifelong learning, adapting work places to a more diverse workforce, developing employment opportunities for older workers and supporting active and healthy ageing, (d) equalizing the pensionable age of men and women and (e) supporting the development of complementary retirement savings to enhance retirement incomes” (European Commission White Paper, 2010).

### *Aging and Security*

In a post 9/11 global context, both America and European countries with growing ethnic minorities tend to present exigencies regarding national identity, social stratification, cultural discrepancies and decline of native-born populations under the umbrella of the threat of violence, while more factual concepts such as population decline and aging are balanced out<sup>13</sup>.

From a demographic standpoint, aging represents a turn in a population’s age distribution that produces a median age boost; this is commonly linked to a larger number of 65+ year old and a reduced cohort of under 15-year-old. In terms of population aging dynamics over the past centuries, declining fertility and increased longevity have been the major culprits for the increased median age present in some states. Both European and Eastern Asian countries, which have been gaining a large percentage of seniors, are therefore approaching the end of the mature stage, being threatened by illness, constricting physical mobility and risk of poverty.

The 2011 American Census Bureau International Program Center report has shown that by the year 2030 29 countries of over one million residents (26 from Europe and 3 in Eastern Asia) will display a median age of 45+, while China has a projection of 43. The paradigm shift in demographic patterns is also augmenting the relevance of non-traditional instruments of conflict in security management: ethnic diasporas and renewable resources; national security strategists place more emphasis on these two elements, pointing out their likely impact and showcasing communities such as the Armenians in France and United States of America, Indians in Western Europe, Russians in Central Asia or the Jewish diaspora<sup>14</sup>.

Key stakeholders, such as the European Union, the UN, IMF, World Bank, WTO, OECD, WHO, NATO or UNFPA have a longstanding tradition in informing decision makers and providing research analyses regarding demographic security issues, showing concern regarding the demographic transition. More so, research has shown that states approaching the final phases of demographic transition are statistically inclined to have a smaller frequency of civil conflicts<sup>15</sup>.

<sup>13</sup> R. Cincotta, *The Next Steps for Environment, Population, and Security. Demographic Security Comes of Age*, 2004. Available online at [https://www.wilsoncenter.org/sites/default/files/ecspr10\\_C-cincotta.pdf](https://www.wilsoncenter.org/sites/default/files/ecspr10_C-cincotta.pdf).

<sup>14</sup> B. Nichiporuk, *The Security Dynamics of Demographic Factors*, Santa Monica, RAND Corporation, CA, 2000.

<sup>15</sup> R. P. Cincotta, R. Engelman, D. Anastasion, *The Security Demographic – Population and civil conflict after the cold war*, “Publication Action International”, Washington, 2005.

As the demographic transition occurs differently in each country, being influenced by social and political factors, international organizations and partnerships risk to be affected as their financial, political and military priorities rearrange. This directly opposes scholars who offer the – unlikely – perspective that fast aging processes will lead to geriatric peace, a state in which the main geopolitical players would lack sufficient financial and human resources for large-scale armed conflicts.

NATO is unswervingly impacted by population aging, as the predicted decrease of European members' military budgets in favor of managing the demographic crisis will increase the gap in financial allocations and formulate a climate of animosity. The slower aging dynamic of the United States and expanding working class will help them keep up military funding, and may lead them to look for new and dependable allies.

In addition, public opinion is also influenced by aging and its effects: as increasingly smaller families (particularly those with an only child) are less inclined to support him or her joining the military profession, so that “matching manpower demand and supply will likely become more and more difficult”<sup>16</sup>.

Population growth rates also impact the military system. Areas showing a constant demographic growth – such as Asia or Africa – encounter the problem of having to train a large number of people and are challenged in terms of acquiring technology. On the other hand, a reduced younger cohort leads to a reduced military force as far as personnel is concerned; while by itself this is not necessarily dire – as modern warfare is more dependent on technology than personnel – the amount of resources necessary in order to train a smaller amount of people for complex and somewhat technical missions, as well as purchase said equipment escalates the financial strain – as seen in Britain and France<sup>17</sup>. Consequently, the growing older cohort demanding state funding may very well pose a threat to the defense budget, especially in countries without significant security threat levels.

As demographic trend discrepancies will intensify towards 2050, global security will have to face numerous challenges; Christian Leuprecht classifies them into three major types, nation-states (i.e. the scenario of a declining Russia and rising Pakistan), age groups (powerful intergenerational conflicts), rural-urban groups (urbanization and land conflicts), ethnic and religious groups – “solipsistic conflict conjured up by Hindu nationalists concerned about Muslim demographics in India, Zionists concerned about Palestinian population growth in the Occupied Territories”<sup>18</sup>.

### *The Romanian Context*

Cross-national comparisons and analysis are difficult due to insufficient information regarding ethnic composition, fertility and mortality rates. Available

<sup>16</sup> W. Apt, *Germany's New Security Demographics. Military Recruitment in the Era of Population Aging*, Springer, Heidelberg, 2014.

<sup>17</sup> B. Nichiporuk, *The Security Dynamics of Demographic Factors*, Santa Monica, RAND Corporation, CA, 2000.

<sup>18</sup> C. Leuprecht, “Security Policies: Demographic Trends and International Security” in *Encyclopedia of Public Administration and Public Policy*, Third Edition, Taylor & Francis, Abingdon, 2015.

data regarding Romania shows that projections on population growth are dim – keeping the 1,3-fertility rate we have in the present, as generations born after 1989 enter the 20-40 cohort we will experience an inevitable demographic destabilization<sup>19</sup>.

Both social cohesion and economic prosperity are influenced by aging and population decline, as many countries struggle with a dwindling workforce and expanding percentage of the elderly. In the case of Romania, this has been apparent in recent years. For one, the 2008 decision to implement a mandatory private pension plan, known as “Pilonul II”, was a major turning point in how the state manages social protection mechanisms. This measure guarantees an addendum to the state-offered pension plan by making private companies collect and invest part of the individual contribution known as the social security tax. This measure is compulsory for all individuals younger than 35 and elective for those between 35 and 45. Romania now has 7 mandatory pension funds, approx. 6,24 million contributors and an average input of 106 RON; for an individual gaining the average wage and with a life expectancy of around 20 years after retirement, this amounts to a sum between 220-480 RON added to the state-offered pension (Private Pension Sector Financial Oversight Authority Report, 2016).

Population aging also has a direct impact on politics, the most visible example being that of election-related mechanisms. As according to the latest reports provided by the Romanian Central Electoral Office, political choice decision-making is an attribute of the elderly, the main age groups voting consistently being the 45-64 and 65+ ones<sup>20</sup>. Delving further into the issue, we will see that this particular age cohort has a documented tendency to vote for the Social-Democrat Party (PSD), a historic Romanian political party shaken by various scandals in the last decade but still endorsed by the elderly population as it was the first political party after the fall of the communist regime. Effects of this dynamics are also present when we look at how politicians build their campaigns, as they consistently focus on health, poverty and pensions in order to maintain the interest of their voters.

As stated previously, traditionally demographic elements can have a profound impact on how civil conflicts arise. To illustrate this, we can refer to two of the main anti-government movements in recent years, the Collective scandal and the corruption decree protest. In both cases, protesters belonging to the younger segment of the population rose against leaders or programs implemented by leaders chosen by the voting cohort, i.e. the elderly – this depicts a severely fragmented society.

As stated by both the National Statistics Institute and United Nations Organization, Romania exhibits the highest infant mortality rate in the European Union, experts anticipating an even more profound demographic decline in the following decades; this extreme population aging has had multiple effects, one

<sup>19</sup> V. Ghețău, *Declinul demografic și viitorul populației României. O perspectivă din anul 2007 asupra populației României în secolul 21*, ALPHA MDN, Buzău, 2007.

<sup>20</sup> Biroul Electoral Central, *Prezența la vot la alegerile parlamentare din decembrie 2016*, available online at <http://prezenta.bec.ro/>, 2016.

of them being an increase in the medium age from 33 in 1990 to 40-41 in 2015. More so, other reports show that by the year 2041 one employee will sustain 2,5 pensioners, as Romania will have around 3 million people in the work force and 7 million retirees (National Statistics Institute, 2017). According to Vasile Ghețău, median values in demographic projections of the year 2050 have suffered changes every couple of years: 2004 UN reports predicted a population of around 17 million in 2004 and 15 million in 2007 (in keeping with the current value of fertility rate) – more so, the 2050 age pyramid in Romania forecasts a 34% consisting of the 65+ cohort<sup>21</sup>.

### *Conclusion*

From a biological perspective, aging is a complex process, genetically determined and attuned to the environment. On a case-to-case level, being healthy has much to do with choices and characteristics such as genetic history, social position, behavior, attitudes, lifestyle options and health-related values. Researchers in the study of aging tend to align themselves to one of two positions concerning what is to come. The first one is a bleak, even fatalistic one, considering population aging as a global threat to humankind, a phenomenon that will eventually crash pension funds and healthcare and even stop progress. The other perspective is based on a socio-demographical analysis of events and paints a more positive picture, stating that the main problems identified by Western societies regarding population aging are social rather than demographic, therefore needing social, not demographic solutions (Rotariu, 2006<sup>22</sup>). While the field of social gerontology is comprehensive enough to explain many of the aspects of aging, as shown throughout this paper, social and economic security implications posed by this cohort require a more structured approach.

Similarly to how the Cold War formulated a new type of conflict, the past years have been marked by a subdued, yet permanent talk around the many problems posed by the demographic context in many countries. Consequently, demographic security is a relatively new concept, which concerns itself with the way countries deal with issues such as age structure, ethnic composition, how changes amongst them impact both national security and how the population perceives their degree of security<sup>23</sup>. While an incumbent demographic crisis formulates serious warnings to national resiliency, research has shown that various counter-measures can be successfully implemented – education reforms, city planning, functional management of internally displaced people (IDPs).

As far as the United States is concerned, the major turning points for the elderly are linked to problems such as the increasing cost of prescription drugs, procedures not covered by either Medicare or private insurance, growing costs

<sup>21</sup> V. Ghețău, *Declinul demografic și viitorul populației României. O perspectivă din anul 2007 asupra populației României în secolul 21*, ALPHA MDN, Buzău, 2007.

<sup>22</sup> T. Rotariu, *Demografie și sociologia populației*, Polirom, Iași, 2006.

<sup>23</sup> R. Cincotta, 2014, [https://www.wilsoncenter.org/sites/default/files/ecspr10\\_C-cincotta.pdf](https://www.wilsoncenter.org/sites/default/files/ecspr10_C-cincotta.pdf).

of private insurance (filling in the gaps created by Medicare) and various concealed cost regarding long-term medical care – i.e. instrumental and physical support offered by either family members, nursing homes or assisted living<sup>24</sup>.

Changes in the age structure, particularly the increasing percentage of people over 65, not only determine significantly smaller percentages of other age groups, create social and political pressures and feed intergenerational conflicts, but also change the way nations spend their money. If we were to focus on Romania, changes concerning the older population, in both policy and public opinion, should occur as early as possible, especially if we look at the population structure predictions for 2050. A competent grasp of population age shifts is captious in designing policy, as “fertility, mortality and migration are the only set of variables in the social sciences that can be projected forward over the medium term with a high degree of accuracy”<sup>25</sup>.

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<sup>24</sup> J. R. Knickman, E. K. Snell, “The 2030 Problem: Caring for Aging Baby Boomers”, *Health Services Research*, vol. 37, no. 4, 2002, pp. 849-884.

<sup>25</sup> C. Leuprecht, “Security Policies: Demographic Trends and International Security”, in *Encyclopaedia of Public Administration and Public Policy*, Third Edition, Taylor & Francis, Abingdon, 2015.

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