



## Generations: Connections across the life course

Marc Szydlik\*

University of Zurich, Institute of Sociology, Andreasstr. 15, CH-8050 Zurich, Switzerland

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### ABSTRACT

Five kinds of connections are discussed in this paper: (1) Family generations are connected across the life course. Parents and (adult) children are linked by strong lifelong bonds. (2) At the same time, there are long-term connections between family and the state. For example, welfare state regulations affect the extent and patterns of intergenerational solidarity within families. (3) One can observe connections between generational bonds and social stratification. Over the life course, family solidarity leads to a cumulation of social inequality. (4) A theoretical model is offered which centrally proposes connections between individual needs and opportunities, families and cultural-contextual structures. (5) Connections between theoretical considerations and empirical research are discussed, taking help, care and inheritance as examples.

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### 1. Introduction

How strong is the solidarity between family generations across the life course? What happens when children grow older and leave their parents' household? Is there still a connection between adult children and parents who do not live in the same household any more? Do they help each other, for example, in the household, in the case of illness or old age, or in form of financial transfers? Previous research has shown that private intergenerational relations do not break up in adulthood and old age (e.g. Brandt, Haberkern, & Szydlik, 2009; Nauck, 2009; Rossi & Rossi, 1990; Silverstein & Bengtson, 1997; Steinbach, 2010; Szydlik, 2000, 2008). In fact, one can speak of a lifelong solidarity between parents and children, reaching from cradle to grave. However, these are general results only. In order to develop a more thorough picture, one needs to address further important issues.

Empirical research shows considerable differences between various population groups in regard to intergenerational cohesion. Moreover, recent research suggests

tremendous differences between countries. This implies that private intergenerational relations are affected by societal circumstances, including welfare state regulations. Therefore, it is a crucial research question to what extent intergenerational cohesion across the life course depends on contextual factors. Are there different solidarity patterns within families in reaction to societal conditions? What are the connections between public and private intergenerational transfers? The proposed interconnectedness between family and society also leads to questions of societal and familial change. In this respect, demographic change and new flexibilisation demands on the labor market may lead to alterations in welfare policies and new family outcomes. How stable are bonds between family members across generations over the life course?

The connection between family and society goes in both directions. On the one hand, societal contexts influence lifelong intergenerational behavior. On the other hand, family solidarity may have strong consequences for societies at large. An especially important connection is the one between intergenerational solidarity within families and social inequality. In general, parents help their children as good as they can. Obviously, parents from higher social classes have better opportunities for doing so. It is a crucial research topic to investigate the lifelong

\* Tel.: +41 44 635 23 40; fax: +41 44 635 23 99.

E-mail address: [szydlik@soziologie.uzh.ch](mailto:szydlik@soziologie.uzh.ch).

bonds between parents and (adult) children in regard to their consequences for social stratification. Again, a life course approach is most suitable here.

Connections between family and society require sociological research with sound links between theoretical considerations and empirical research. It is an important sociological task to find out why some population groups show stronger intergenerational solidarity across the life course than others and which different patterns can be observed. As a basis for corresponding empirical analyses, a general theoretical model is proposed, consisting of individual, familial and societal characteristics, specifically opportunity and need structures, family structures and cultural contexts.

The goal of this paper is to offer conceptual reasoning on intergenerational relations in a life-course perspective – focusing on linkages between the state, family and stratification. The general theoretical argumentation refers to relevant examples of intergenerational solidarity, particularly help, care and bequests. The paper is structured as follows: In the next section, the above-mentioned issues will be elaborated. I will start with connections between welfare state and family before discussing consequences of private solidarity for social inequality and briefly introducing a theoretical model as the basis for empirical investigations (Section 2). Since empirical analyses are crucial in order to find out more about connections between family and society across the life course I will offer selected empirical results: Section 3 examines international differences in help and care from adult children to their elderly parents. This will lay the groundwork for empirically investigating the consequences of different welfare state regulations for private intergenerational solidarity. The results will also offer an opportunity for an empirically driven discussion of the consequences of demographic change, labor market flexibilisation and welfare state developments. Section 4 addresses the connection between society and family from the opposite direction by offering empirical results on consequences of family solidarity for social inequality focusing on inheritances. Again, a life-course approach is employed. Finally, the paper ends with some concluding remarks and indications for further research.

## 2. Family, state and stratification

### 2.1. Welfare state and family

What is the relation between welfare state regulations and intergenerational support within families? Previous hypotheses indicate two scenarios: One scenario relates to the so-called “crowding out” hypothesis according to which the welfare state displaces the family. In this line of reasoning, the family can be expected to again step into the breach in case of the welfare state’s withdrawal. Conversely, some argue that state-provided welfare services may even free familial resources and, therefore, strengthen or stimulate family solidarity (e.g. [Künemund & Rein, 1999](#)). There may also be a specific combination of private and public responsibility in terms of a mixed welfare regime, engaging both families and the state in managing

the risks of old age (see [Daatland & Herlofson, 2003](#); [Daatland & Lowenstein, 2005](#); [Igel, Brandt, Haberkern, & Szydlik, 2009](#); [Litwak, Silverstein, Bengtson, & Wilson Hirst, 2003](#); [Motel-Klingebiel, Tesch-Römer, & Kondratowitz, 2005](#); [Reil-Held, 2006](#)). This would lead to immense consequences for intergenerational solidarity across the life course. In fact, one may even assume different support patterns and intergenerational relations – with considerable consequences for life courses – depending on welfare state regulations (e.g. [Kohli, 1999](#); [Mayer, 2004](#)). Therefore, various aspects of private intergenerational solidarity may be more or less prominent in different states. For example, in regard to life courses, it is especially important to consider both the recipients and providers of help and care.

At the same time, the welfare state is increasingly coming under pressure from demographic change. The situation is especially dramatic for senior citizens in need of help and care. Requiring care is becoming a mass phenomenon: While the numbers of those in need are steadily increasing, this trend is faced with decreasing care options. The flexibilisation of work is one reason for this development. Workplace flexibility may provide better chances for achieving work-family balance if ‘flexibility’ refers to flexible arrangements granting employees scope for coping with the requirements of everyday life. For the most part, however, it is rather the flexibility demands of the workplace (temporary work, shift work, contract work, mobility in time and place) that put significant strain on family relations. After all, there is a paradoxical situation as the demand for flexibility in the realm of work contradicts the wish for stability in the realm of the family, which goes beyond issues concerning the compatibility of child care and employment. The increasing demand for flexibility in working life can have a negative impact on providing support for parents in need of help and care. Providing care is often heavily or even excessively burdensome, and with demands for flexibility being on the rise at the workplace, adult children have less disposable time available, thus exacerbating the conflict between career and care.

In addition, the labor market demand for mobility and the growing distances between residences that it gives rise to is taking an extra toll on intergenerational potentials for help and care ([BMFSFJ, 2006, p. 142](#)). Spatial distance is, after all, one of the major determinants for intergenerational solidarity among adults, if not the most significant one. Shorter geographical distances coincide with more frequent contacts, higher levels of personal assistance and closer emotional ties ([Szydlik, 2000](#)). The fact that, despite separate households, most adult children do not live far away from their parents is certainly a key reason for the strong, lifelong bonds between the generations. Yet, when the flexibilisation of labor goes along with greater geographical mobility, this is likely to increase the distance between the homes of the adult children and their parents – and can thus be expected to reduce the potential for intergenerational solidarity. Growing investments in education point in the same direction as they also tend to increase the spatial distance to the parents ([BMFSFJ, 2006, p. 138](#)). At any rate, empirical findings based on the German Aging Survey (respondents are 40–85 years old) already indicate larger distances between the residences of

parents and their adult children for the period between 1996 and 2008 (Motel-Klingebiel, Wurm, & Tesch-Römer, 2010). All of these factors make it more difficult for the middle family generation to balance career and care.

Other reasons for decreasing care options are the rise in women's participation in the workforce and the decline in the number of siblings to the effect that potentially fewer individuals are available to provide family-based care. Furthermore, there is a danger that the financial problems of the welfare state will increasingly lead to holding families – or more precisely female family members – responsible for performing care tasks.

This raises the question of social policies. A good strategy for identifying best practice examples is to carefully examine the support provided to those in need of help and care under different welfare regimes. Does the family really step into the breach in case of a weak welfare state, or, quite to the contrary, do public services even enhance the provision of private support? It is ultimately a matter of empirical research to determine which of these two hypotheses applies.

## 2.2. *Generation and inequality*

In regard to connections between intergenerational solidarity and social inequality, it makes sense to employ a life course perspective as well. Amongst other things, such a perspective offers the opportunity to consider the cumulation of inequality due to lifelong intergenerational solidarity. In the following, I will discuss the support of parents, effects for their children and consequences for social inequality – across the whole life course.

Starting with early childhood, parents lay the groundwork for unequal conditions in life courses from the outset. Parents' monetary resources determine where and how their children grow up: Does each child have its own room? How spacious is it? Is there a yard? Or are children forced to live in cramped conditions and otherwise unfavorable circumstances, maybe even being affected by child poverty? The parents' choice of residence is also an important factor for determining the social background of their children's friends, which, for instance, encourages or inhibits educational ambitions. The amount of allowance given a child, brand name clothing, electronic equipment and sporting goods are channels by which parents influence the social recognition that their children receive from peers.

Parents play a decisive role in child education, for instance, by reading children's books to them but also through the enormous impact of choice of school (e.g. OECD, 2001; Shavit & Blossfeld, 1993). This has consequences for other dimensions of social inequality: the better educated achieve better jobs, higher incomes, greater prestige, are less frequently unemployed and less often ill, live longer, and have better opportunities in the marriage market. A major factor involved in predetermining all of this at an early age is the transition to the lower, intermediate or higher tracks of secondary education, and parents have a major influence on the matter.

Parent aspirations and resources also have an effect on the educational success of children within the respective

school systems, be it by way of individual incentives, educational ambition, monitoring and giving support with homework or also by privately organizing and funding additional tutoring for their children. Whether parents provide books and computers or can support their children in spending time abroad to improve their language skills also makes a difference. Parents' social networks play an important role as well, for instance, in the search for internships, positions for vocational education and training, or jobs, just as does the more or less tacit knowledge and proficient use of cultural rules (Bourdieu, 1984).

Since recent sociological research on generations has shown intense lifelong relationships between parents and their adult children across the boundaries of the individual households, we can now further trace connections between intergenerational relations and social inequality over the life course. Financial transfers are especially important in this respect. They range from small gifts and occasional support to transfers of great wealth from one generation to the next.

In the case of current transfers of a smaller kind, the findings are to some extent contradictory: On the one hand, particularly parents with greater financial resources provide financial support for their adult children outside of the parental home. On the other hand, especially those adult children in financial need are recipients of such support, which indicates a narrowing of the current inequality gap between children in education and training, who command less financial means compared to those in employment (cf. Kohli, 1999; Künemund, Motel-Klingebiel, & Kohli, 2005). This may also involve investments in tertiary level education, which in turn can be expected to lead to greater income disparities in the long-term.

What is the connection between intergenerational wealth transfers and social inequality? Against the background of previous intergenerational solidarity, it is reasonable to assume that parents will leave (most of) their estate to their children, which has considerable consequences in terms of social stratification. Again, this is an empirical question – which will be addressed in Section 4.

## 2.3. *Theoretical model*

As a basis for empirical investigations of intergenerational relations, I propose a general theoretical model (see Szydlik, 2000, 2004, 2008). This model has been used for a range of empirical analyses on various forms of intergenerational solidarity, including research on emotional bonds, help, care and financial transfers. The model offers a framework for analysing relevant aspects of intergenerational relations, whether for single moments in time or for a series of snapshots across the life course, and for investigating the dynamics and change of intergenerational relations. Thus, the model provides a general conceptual framework for more detailed theoretical reasoning as a basis for empirical analyses. In order to apply the broad theoretical model to specific research questions, for example, in regard to emotional closeness, coresidence, geographical distance, instrumental help or financial transfers, more specific theoretical argumentation is needed. This allows relating different forms of

intergenerational relations to one another, for instance, financial transfers to emotional closeness and/or frequency of contact. In this way the general model also provides a helpful tool for developing appropriate hypotheses as a basis for empirical research. The model will be briefly presented below. Since this paper offers empirical results from research on help and care, on the one hand, and bequests, on the other, examples will be drawn from these aspects of intergenerational solidarity (for detailed applications of the model to specific research questions, see Brandt et al., 2009; Haberkern & Szydlik, 2010; Igel et al., 2009; Szydlik, 2000, 2004, 2011).

Intergenerational solidarity comprises both specific behavior and a feeling of belonging and close bonds between family generations. Intergenerational solidarity involves a series of facets that can be classified into three dimensions, symbolized by the three circles at the center of Fig. 1: Affectual solidarity (emotional closeness), associational solidarity (common activities) and functional solidarity (giving and taking of money, time and space; see Bengtson & Roberts, 1991; Szydlik, 2000, 34ff). Help, care and bequests are a form of functional solidarity.

Which determinants influence solidarity, in this case the likelihood and extent of help, care and bequests? The diverse conditional factors can be classified into four groups, namely opportunity, need, family and cultural-contextual structures. Hereby, three levels of analysis are distinguished: individual, family and society. Intergenerational relations are generally dyadic, which means that essentially two people are involved (e.g. caregiver and recipient, testator and heir) each with specific opportunities and needs. This relationship is embedded in a family and, beyond that, in a societal context. Among the groups of factors are influences and dependencies (represented by arrows). In the following, the four groups of factors will be explicated, including corresponding hypotheses for empirical analyses.

*Opportunity structures* reflect opportunities or resources for solidarity. They enable, promote, hinder or prevent

social interaction. For example, a closer geographic proximity enables adult children to provide help or care for a parent. Conversely, if the parents possess financial resources, including some level of wealth representing a future bequest, this may lead to better chances of being cared for by an adult child. Opportunity structures also refer to both testators and heirs. Testators have to own something that they can bequeath. From the point of view of prospective heirs, a wealthy parent obviously increases the chance of inheriting something.

*Need structures* indicate the need for solidarity. This applies to both caregivers and recipients, testators and heirs. Frail parents may be in need of help and care (be it a short-term or long-term illness or a condition even requiring lifelong help or care), or there can be emotional needs (i.e. for attention, companionship, consolation, recognition and understanding). Adult children with greater financial needs may be more likely to help their parents. Testators may want to bequeath their estate to one specific heir, or potential testators may have to spend their money or estate to address their own needs; they may even require additional financial support, e.g. to keep the family home. In this case, prospective heirs may meet the needs of future testators in order to be reimbursed by a (higher) inheritance.

The arrows around the inner circles in Fig. 1 indicate that opportunities and needs may be intertwined; for instance, the needs of one person may correspond with the opportunities of another. Also, the needs of adult children may contradict those of their parents, for example, when the parents are in need of care. It may also be the case that parents would like to keep their property (e.g. the home they live in) as long as possible and may not want to pass it on too early, not least, because they may not be sure whether their children will still provide attention and care afterwards ('King-Lear effect'). On the other hand, the children are likely to favor an early transfer of their parents' property.

Nevertheless, needs are not always likely to be fulfilled. Of course, poor children are in especially great need of

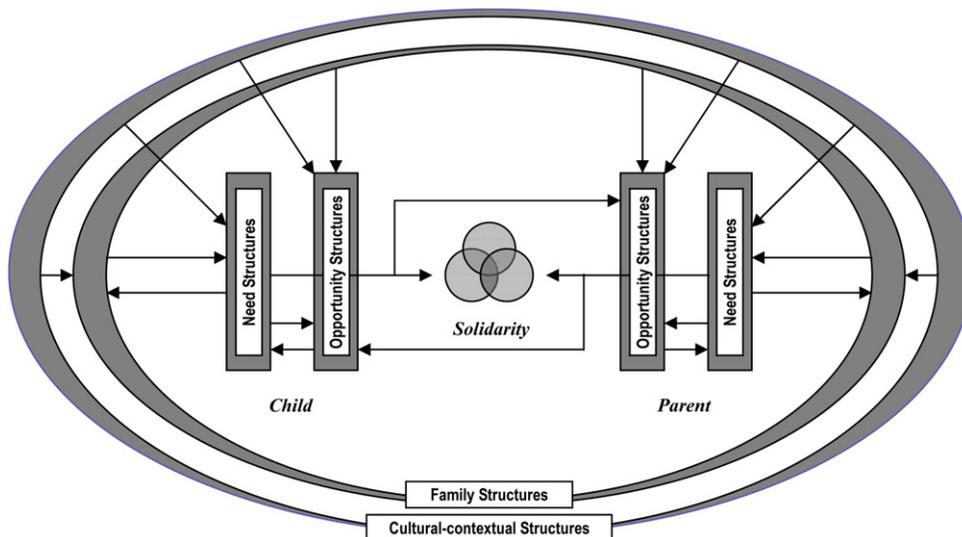


Fig. 1. Theoretical model.

receiving an inheritance. However, poor children relatively seldom have rich parents. In contrast, upper-class parents have far better opportunities of supporting their children in many ways throughout their entire life and thus contribute to the reproduction of social inequality. Employing a life course perspective, one can indeed hypothesize in regard to empirical analyses that resourceful parents support their children throughout their whole life – including a higher bequest (see Section 4).

The relation between parent and child is embedded in *family structures*. They include, for example, family size and composition, earlier family events as well as family roles and norms. In regard to help and care, the existence of (female) siblings may lower the likelihood of providing care for one's parents. Having (small) children of one's own who need care and attention may lead to a similar situation. Moreover, with regard to inheritances, the existence and number of siblings as competitors may also play a crucial role. Another question is whether the surviving spouse or the children are supposed to inherit more or whether children in greater need or better qualified children should receive a larger share. Does a testator violate family norms if s/he favors one child over the other/s out of affection? On the one hand, children who have kept the family line going may receive higher inheritances. On the other hand, grandchildren may also emerge as competitors for an inheritance if testators decide to skip their children (e.g. because of affection, age, economic need or qualification).

*Cultural-contextual structures* represent societal conditions within which intergenerational relations develop. These include conditions of the social, economic and tax system (e.g. inheritance tax), the welfare state, the labor and housing market, as well as specific rules and norms of certain institutions and groups (arrows in Fig. 1 indicate a possible interplay with rules and norms on the family level).

Political and economic regimes as well as welfare state regulations are elements of cultural-contextual structures. To understand their impact, it is important to analyze support patterns in different countries. As mentioned above, the size of the service sector may play a crucial role for the kind and extent of help and care behavior that adult children exhibit toward their elderly parents. Disparities between market and planned societies are also of special interest. Regime differences may still have long-term significance even decades after the collapse of the so-called 'socialist' regimes. Bequests may play a greater role in regimes that 'allow' individuals to build private property, e.g. homes, businesses, stocks and shares. Therefore, socialist regimes are less likely to show high rates of substantial bequests. Additionally, migrants may have smaller chances of receiving a bequest due to their specific economic situation (see below).

Gender roles exist on the meso level of families, but also on the macro level of societies at large. For example, traditional norms and roles suggest that daughters are more likely than sons to take care of frail parents. Moreover, women have always inherited less than men. Family property has mostly been passed on to a male heir (cf. Rosenbaum, 1982, 49ff., 60ff.). However, laws have

changed and the smaller number of children (siblings) decreases the probability of a male heir. This also applies to the reduced number of farms and small businesses (cf. Kosmann, 1998, p. 149). Nevertheless, especially in the latter cases, gender may still be of some significance. In general, however, gender differences in inheritance are likely to be considerably smaller than those between regimes and classes (see Szydlik, 2004, 2011).

### 3. Help and care

The empirical analyses of help and care are based on the "Survey of Health, Aging and Retirement in Europe" (SHARE; for previous analyses of intergenerational relations, see, for example, Albertini, Kohli, & Vogel, 2007; Attias-Donfut, Ogg, & Wolff, 2005; Hank, 2007; Kalmijn & Saraceno, 2008; Schenk, Dykstra, & Maas, 2010). The first wave of the survey was conducted in 2004. It offers a representative data set with nearly 30,000 respondents, including detailed information on families and social support, health, the economic situation as well as expectations and attitudes of the population of 50 years and older and their (younger) partners in Austria, Belgium, Denmark, France, Germany, Greece, Italy, the Netherlands, Spain, Sweden and Switzerland. In this section, the focus is on help and care provided by adult children for their elderly parents depending on the welfare state context.

SHARE asks the following questions: "Now I would like to ask you about the help you have given to others. In the last twelve months, have you personally given any kind of help [...] to a family member from outside the household, a friend or neighbor? [...] Which types of help have you given to this person in the last twelve months? (1) Personal care, e.g. dressing, bathing or showering, eating, getting in or out of bed, using the toilet. (2) Practical household help, e.g. with home repairs, gardening, transportation, shopping, household chores. (3) Help with paperwork, such as filling out forms, settling financial or legal matters". In this paper, the first category will be abbreviated as "care", the two others will be summarized as "help".

First of all, Fig. 2 shows large differences in the percentages of intergenerational help and care (for a documentation of the percentages in form of country maps, see Brandt et al., 2009). Practical household help and help with paperwork is much more prominent than personal care, including dressing, bathing or showering, eating, getting in or out of bed and using the toilet. This difference not least reflects the need situation of the elderly parents. In the absence of such needs, adult children do not find themselves in a care situation. In contrast, 'sporadic' help under the threshold of intense personal care occurs much more often. Again, these empirical results indicate intergenerational solidarity across the life course. In general, adult children do not leave their elderly parents alone. Instead, children help their parents on many occasions throughout their lives.

In addition, the figure indicates considerable international differences. In Sweden, a third of the respondents helped their parents in the last year (this percentage would have been even higher had a longer time frame been chosen in the questionnaire). In Germany, this applies to

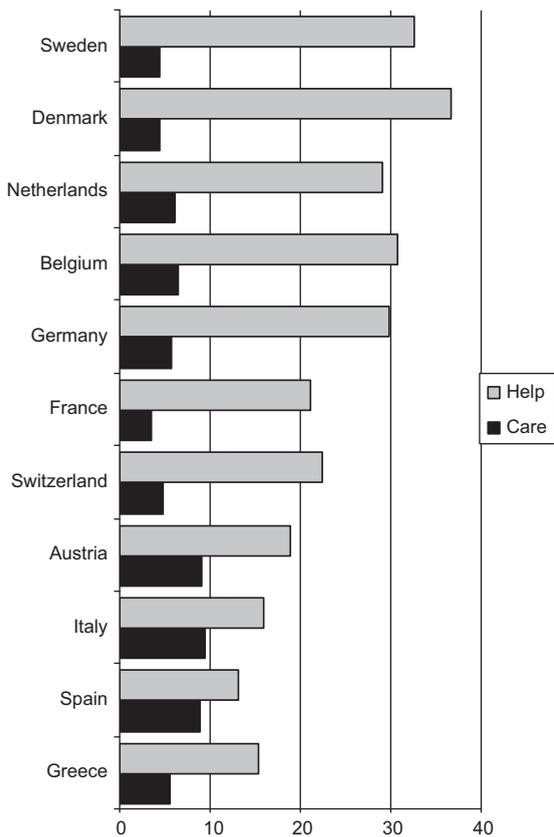


Fig. 2. Help and care for parents. SHARE 2004 release 2, weighted.  $n = 8021$  dyads, see Brandt et al., 2009.

30%. In Southern Europe, however, one finds much lower help rates of around 15%. This means that less than half as many child–parent relationships are marked by adult children helping their parents in Italy, Spain and Greece compared with Sweden and Denmark.

Help and care seem to follow opposite patterns. Whereas help follows a North–South gradient, care seems to be more prominent in the south of Europe. In Sweden, around 4% of the children cared for their parents in the last twelve months. In Italy, this applies to nearly 10% of the children. Additionally, Fig. 2 suggests that help and care seem to be contradictory in the countries surveyed: the more help in a country, the less care – and vice versa.

How can one explain these striking international differences? Of course, one can never exclude individual and familial characteristics as a reason for differences on the macro level. Indeed, multivariate analyses indicate substantial effects of opportunity, need, and family structures (geographical distance, health, education, income, employment, transfers, partner, age, gender, children and siblings). However, large country effects persist even after controlling for these independent variables (Brandt et al., 2009; see also Haberkern & Szydlik, 2010). Obviously it makes sense to discuss empirical differences between countries in regard to inequalities that can be attributed to the macro level. In this case, welfare state regulations seem an especially promising subject.

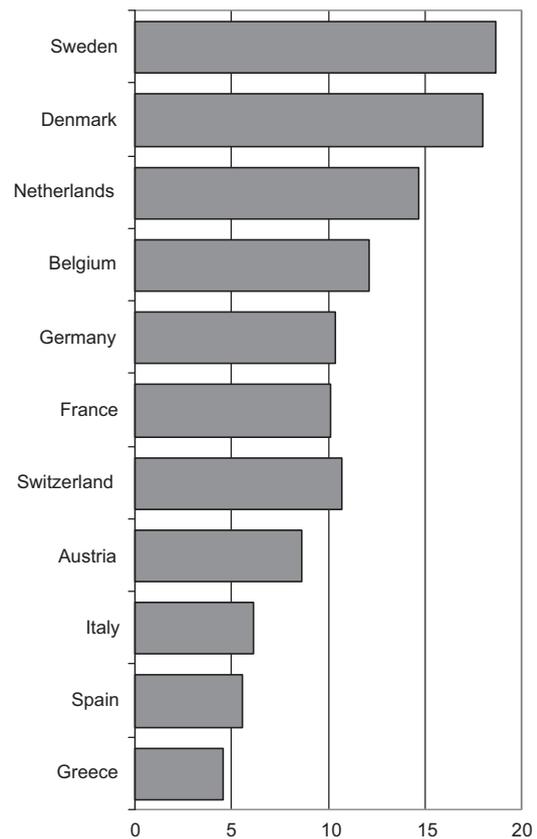


Fig. 3. Social services. Percentages of employees in social services by country. Source: ISIC N: OECD (2007).

Fig. 3 offers an empirical indication for macro-level inequalities. It shows the percentages of employees in the social and health related service sector in a country – which may ‘substitute’ private support within families. Stronger welfare states go hand in hand with a higher percentage rate of social service employees. This has consequences for intergenerational relations. Figs. 2 and 3 suggest that a stronger welfare state has a positive influence on intergenerational help and negative consequences on care. These descriptive results are supported by multivariate analyses: the corresponding macro indicator significantly increases the probability of help and decreases the probability of care (Brandt et al., 2009). In other words, strong welfare states tend to crowd out care while crowding in help.

The explanation reads as follows: In countries with a developed social service sector, families have greater chances of receiving public and market-provided support. Therefore, in those countries, adult children are less required to provide intense and time-consuming care for their frail elderly parents, which also coincides with lower normative and legal obligations (Haberkern & Szydlik, 2010). Instead, these services tend to be conducted by professional carers, which also removes a great part of the care burden from the adult children. This enables adult children to provide (less intense and burdensome) help for their parents, including household help and help with

bureaucratic matters, e.g., in order to accomplish a successful mix of private and public support.

Based on these findings, one can discuss the consequences of welfare state retreat due to demographic change for private intergenerational solidarity. Weaker welfare states put much more pressure on adult children to provide care for frail elderly parents. At the same time, parents receive considerably less help from their children if they live in a country with fewer social services. In contrast, more private help is provided in stronger welfare states where the state shares the burden of care to a greater extent. Therefore, a retreat of the welfare state may hurt both recipients and carers, both parents and adult children.

#### 4. Inheritance

Inheritances create links between the deceased and living generations of the family (for an extended discussion of inheritances including further empirical results, see Szydlik, 2004, 2011). (Prospective) bequests affect intergenerational relations in the family, be it during or after the lifetimes of the testators. This particularly applies for objects, e.g., the (grand)parents' house, a family business, marriage certificates, the family Bible, letters, diaries and photographs (Halbwachs, 1952). Those objects create memories, and they may also involve obligations for the descendants. Additionally, bequests affect emotions, not only because of grief (Archer, 1999; Parkes & Prigerson, 2010; Valentine, 2008) but also because they may serve as an indication of parental affection toward their children (Bernheim & Severinov, 2003). In fact, a number of bequest types can be structured along two dimensions, namely the testator's autonomy and instructions for the heir (Szydlik, 2011). These include bequest types based on economic models, such as accidental, altruistic, paternalistic, preserving, reciprocal and retrospective bequests (a summary is also provided by Masson & Pestieau, 1997).

However, inheritances not only have huge consequences for families. In order to investigate connections between family solidarity and social stratification, it is important to find out whether inheritances have and will continue to have an impact upon current and future social inequality (e.g. Avery & Rendall, 2002). One central hypothesis reads as follows: The greater the amount of privately heritable wealth in a country, the greater the extent to which social differences may be presumed to be based upon bequests. Inheritances are therefore a sociological research topic that extends far beyond family matters.

In order to investigate the importance of bequests for family and society, it is necessary to conduct empirical analyses. Where do inheritances stem from? How likely is it to inherit a fortune from a distant aunt whom one has rarely known? Secondly, consequences for social inequality will be investigated.

The following empirical results are based on the German Socio-Economic Panel (Wagner, Frick, & Schupp, 2007). This survey expressly refrains from asking about smaller estates without considerable economic value. Instead, the following question was asked: "Have you personally ever come into an inheritance or received a

larger gift? We are referring to transfers of houses and land, stocks and shares, other assets or larger sums of money". If answered in the affirmative, it was additionally asked, for up to three cases, whether this applied to a gift or an inheritance, in which year it was received, what kind of assets were turned over, what they were worth at the time and thanks to whom the recipient came into possession of those assets. Subsequently, questions about future inheritances or gifts were asked: "What do you think? Do you expect to come into an inheritance (again) or receive a larger gift in the future?". The response categories were: "Yes, certainly", "Yes, probably", "No" and "Don't know". Respondents who gave one of the first two answers were then asked whether the estimated value is likely to be more or less than €25,000. For further analyses based on those questions (see Schupp & Szydlik, 2004; Szydlik & Schupp, 2004).

Fig. 4 shows that inheritances mostly stem from previous family generations, especially from one's own parents. Nearly two thirds of the stated inheritances go back to the respondents' fathers and mothers. Thus, succession of property is not restricted to a specific moment but involves a considerably longer period of time. Before bereavement, the prospective transfer of wealth may influence intergenerational relations between parents (testators) and children (presumptive heirs). After death of the bequeather, the financial gain goes along with a great personal loss. It may take some time until heirs are able to accept the inheritance.

Additional investigations show that inheritances largely occur in the second half of life – which is hardly surprising since they mostly stem from fathers and mothers. Parents transfer their property to the next family generation mainly in the form of bequests and not in the form of large gifts. In general, parents keep their resources as long as possible, not least to avoid a 'King Lear effect', since parents may not be sure that children will still keep close contact and be available for help and care if they have already received everything.

What is the connection between inheritance and inequality? Are their specific population groups with better or worse chances of receiving an inheritance? Lower social classes are in greater need; however, the life course perspective indicates that since parents do their best to support their children throughout their whole life, it is the opportunities of the parents rather than the needs of the children that determine intergenerational transfers. Fig. 5

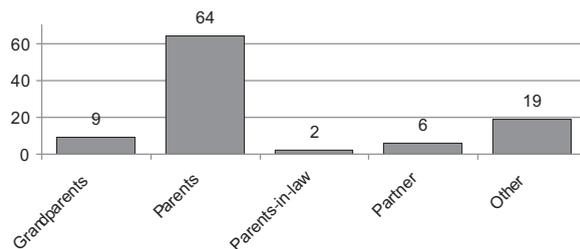


Fig. 4. Source of inheritance.  
Source: German Socio-Economic Panel. Weighted results, own calculations.

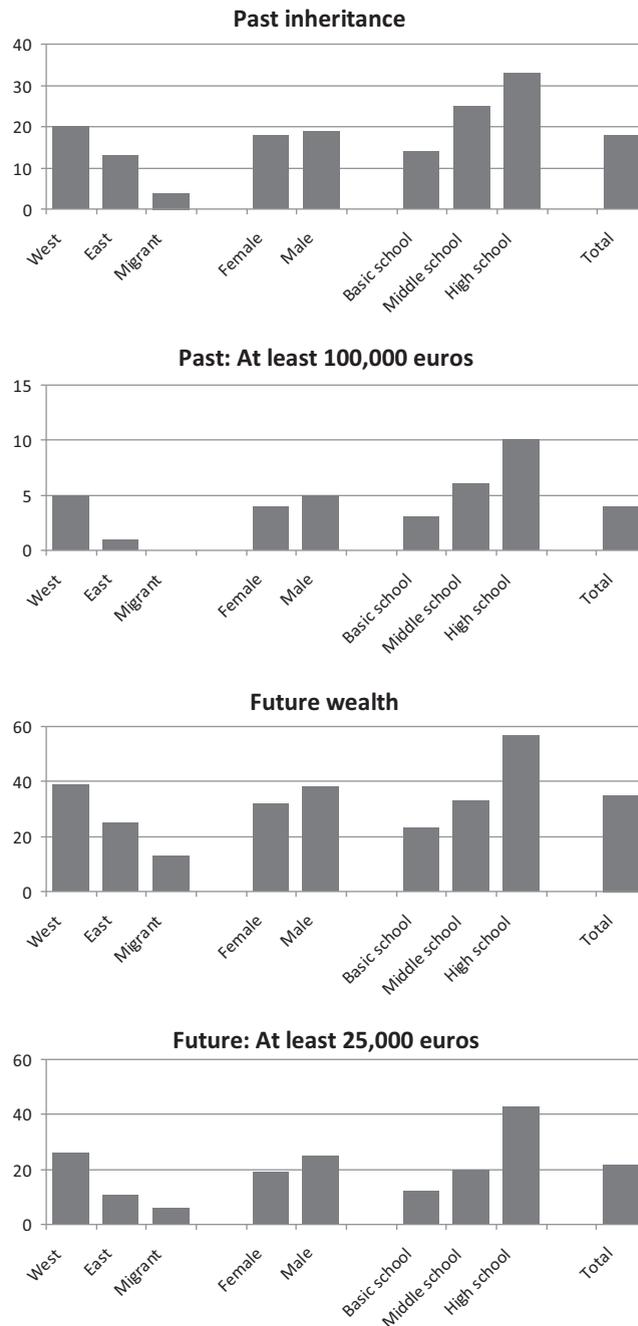


Fig. 5. Past and future inheritances.

Source: German Socio-Economic Panel. Weighted results, own calculations. Past: respondents with at least one deceased parent. Future: respondents with at least one living parent. 'Basic school (Hauptschule)': secondary education, basic track; 'Middle school (Realschule)': secondary education, intermediate track; 'High school (Gymnasium)': secondary education, advanced track.

offers basic empirical results on the connection between inheritance and inequality. Like the results on help and care in Section 4, the following results are supported by multivariate analyses including relevant control variables (see Szydlik & Schupp, 2004; Schupp & Szydlik, 2004). Again, these analyses also prove the importance of opportunity, need and family structures for intergenerational solidarity. For example, deceased parents

enormously increase the likelihood of a previous inheritance and decrease the probability of a future inheritance (opportunity structure). Providing care increases the expectation of a future bequest and indicates expectations of being reimbursed for meeting the needs of potential bequeathers. Moreover, people who have many siblings anticipate future inheritances less often (family structures).

Fig. 5 differentiates between previous and future inheritances. Nearly a fifth of the respondents with at least one deceased parent have received a larger inheritance. Only 4% report an inheritance of at least 100,000 euros. This shows that very large inheritances are restricted to a small part of the population. Of course, it is crucial to find out which groups are most likely to receive a sizeable bequest.

West Germans have an advantage over East Germans in regard to both previous and future inheritances – which indicates long-term consequences of different economic and political regimes. Less assets and lower levels of home and business ownership in the German Democratic Republic still play a major role in inheritance chances. Not least since the regime was not interested in allowing private ownership, it was relatively difficult to become a home owner in the GDR. Furthermore, the so-called economic miracle after WWII was largely restricted to West Germany, and the low rents and housing conditions in the GDR led to people's low interest in inheriting residential buildings. After the fall of the wall, private property could be acquired at comparably low prices, but it will still take some time until this property will be bequeathed.

Germans and migrants show even larger discrepancies (to avoid influences of very different factors, the figure documents inheritances of overrepresented migrants from the former recruitment countries of Southern Europe, namely Turkey, former Yugoslavia and its successor states, Greece, Italy and Spain). The results indicate that migrants have few assets in their previous home countries, which may play a decisive role in migration. Furthermore, migrants from the former recruitment countries face fewer opportunities in the labor market not least due to lower qualification and overqualification. Altogether, this leads to lower wages and fewer opportunities for accumulating wealth. Additionally, migrants have substantially less time to build wealth in the country of destination, both personally and across generations.

In contrast, the figure does not indicate significant gender differences in previous inheritances. Parents no longer favor their sons over their daughters. Who one's parents were is of greater importance than whether one is a daughter or a son. In terms of inheritances, women do not fare worse than men anymore (see Kosmann, 1998). However, to some extent, women less often anticipate future inheritances. Nevertheless, it seems to be unlikely that parents will return to the formerly gendered decision-making practice (see above). It cannot be ruled out that some daughters still assume that their parents may favor their brothers (sons). Another possible explanation for the empirical observation refers to the situation when filling out the questionnaire. In fact, speaking about future inheritances implies death of one's mother or father. Therefore, due to their stronger emotional bonds compared to sons, some daughters are less inclined to imagine monetary gains deriving from the decease of their parents.

Most important in regard to connections between intergenerational solidarity and social inequality are differences in inheritance between social classes. The lower classes are in particular need of receiving a bequest;

however, these needs are not very likely to be fulfilled. Instead, higher classes show much better chances of inheriting. This applies both to the past and the future. The greater economic resources of upper class parents prove advantageous for their (adult) children. Moreover, higher educational classes especially expect large bequests. Further analyses indicate that class differences in inheritance increase over time. Younger respondents show even greater disparities between educational classes. In other words, the further we look into the future, the more significant the disparities between social classes become.

On the one hand, the empirical analyses give evidence to the lifelong intergenerational solidarity within families. On the other hand, inheritances are no exception in the intergenerational reproduction of social inequality. Affluent parents help their children reach the higher social classes as well. Those children also have considerably greater chances of receiving a (high) bequest.

## 5. Conclusions

This paper has shown a number of connections. First, family generations are marked by lifelong solidarity – and beyond. Second, state and family are interlinked. Third, family solidarity has huge effects on social inequality across the life course. Fourth, opportunity, need, family and cultural-contextual structures all play a crucial role for intergenerational cohesion. Fifth, sociological research needs to connect theoretical considerations with empirical research.

Parents and adult children are connected across the life course – from cradle to grave. Even after their death, parents support their children via the transfer of wealth in form of bequests. Nevertheless, this general result is challenged by the fact that various population groups show large differences in the degree and pattern of intergenerational solidarity. Here, country differences are especially striking and call for sociological research. In all observed countries, adult children provide a remarkable degree of help for their elderly parents. However, this applies more to some countries than to others. It is immensely illuminating that help behavior is much more prominent in Northern European countries, which offer a relatively strong welfare state and a comparatively large percentage of employees in social services. This result fails to support the so-called crowding out hypothesis. A strong welfare state does not necessarily lead to weaker family relations. In light of the empirical results for intergenerational help, the opposite holds true. On the other hand, care percentages are in line with the crowding out hypothesis. In countries with a more developed welfare state, there is less need for adult children to take care of their frail elderly. In fact, these results support the notion of a complex welfare mix of family and state. Social services allow relatives more discretion in pursuing their own lives – which means that adult children are in a better position for assisting their parents in the household and with bureaucratic tasks, including help with organizing a suitable mix of public and private support. Thus, against the background of a life course perspective, one has to bear in mind that societies influence family solidarity – and

thereby the life courses of both recipients and providers of help and care.

This also applies when discussing consequences of demographic change and labor market flexibilisation. On the one hand, demographic change increases the numbers of those in need of help and care. On the other hand, labor market flexibilisation poses new challenges regarding the compatibility of employment and helping or caring for others. Providing care for relatives appears to be particularly stressful, and caregivers often wear themselves out to the point of needing help themselves (Meyer, 2006, 36f.). Especially in this respect, demographic change can be expected to have particularly negative effects. With growing numbers of people in need of care, adult family generations will also face increasing demands. Yet, intergenerational solidarity not only threatens to overburden adult children. Elderly parents must also be protected from exaggerated demands. This would include respecting the autonomy of the elderly and their own life planning by not taking for granted that they will automatically step in, whether they want to or not, when their adult children struggle to balance employment and child care (Igel et al., 2009). Although family generations stand in for each other in case of need, they should not be left to their own devices. Families must be able to count on support from a mutually supportive society, or else there will be the risk of overburdening them, which, in turn, might jeopardize family-based assistance – and incidentally lead to huge subsequent costs for society as a whole. In this regard, family-friendly policies are required in order to protect family members from excessive demands and actively support intergenerational solidarity.

Lifelong solidarity does not refer to time transfers only. Whereas adult children tend to support their parents in terms of an upward intergenerational solidarity, in general money flows downwards. Parents support their children with monetary transfers throughout their entire life. Financial transfers from parents do not stop once the children have left their parents' home. In fact, parents are likely to bequeath their whole wealth to the next family generation. Other relatives and especially non-relatives have relatively small chances of receiving an inheritance. Since a bequest comes after the death of a parent, it is not surprising that inheritances mainly occur in the second half of life.

Lifelong family solidarity has immense effects on society at large. Bequests are often a source of impressive increases in wealth. However, this mainly applies to specific groups in the population. Inheritances generally do not offset financial need. Those who have nothing can generally not expect to receive anything either. On the contrary, 'Matthew's principle' applies: "To him that hath shall be given." He who has more, gets more. There is a strong connection between family solidarity and social inequality.

Better educated individuals are much more likely to receive a bequest. In contrast, persons with a lower educational background have considerably smaller chances of inheriting. From a life course perspective, better-off parents help their children to access higher education – and (much) later on the parents still have the

means for considerable bequests. Over the life course, family solidarity across generations results in a cumulation of social inequality.

Connections between welfare state and family, on the one hand, and between intergenerational cohesion and inequality, on the other, also indicate that states influence social stratification via family solidarity. Welfare state regulations affect the way parents and (adult) children relate to one another, which in turn may lead to a different extent and patterns of social inequality between individuals, families and population groups. In this perspective, intergenerational relations can be seen as an all-important link between the state and stratification. Employing the above-mentioned theoretical model, intergenerational solidarity takes place within contextual conditions – and in turn affects social structure. Determinants on the macro level influence meso and micro levels, which in turn alter or stabilize existing macro conditions.

Analytically a life course approach again seems to be well-suited to identify those complex patterns in detail. This may be illustrated by three examples on the basis of previous arguments. For instance, the sooner pupils are divided into basic and advanced schools by state-regulated educational systems, the easier it may be for upper-class parents to assist their children in reaching upper-class status as well. In later years, a weaker welfare state may particularly limit the career opportunities of poor adult children (especially women), since they more frequently have to take care of frail elderly parents when the financial means for private care are lacking. In contrast, a public pension and health system that favors economically well-off pensioners leaves more wealth in the hands of the higher classes and may thus lead to an even more unequal inheritance distribution. Therefore, one of the promising fields of future research is surveying the complex connections between the state and stratification by – theoretically and empirically – investigating intergenerational relations across the life course.

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