Downward Intergenerational Transfers in Europe and the USA

An insight into the dialectic of familial solidarity and social inequality
Introduction: All roads lead to Family

- The emergence context of the generational problematization

  - Economic crisis, welfare state crisis, working class crisis but Family Return!

  - Private Intergenerational Transfers: refamilialization in a remarchandization context, a lesser evil?
Social research on IT: the interaction between four main issues

"Problematization" axis

Family decline?

Solidarity Paradigm

Substitutability Paradigms

Intrafamilial relationships

Individual preferences, pooling, lifecycle

Coherence between public and private IT (institutionalism & culturalism)

Understanding the variability of familial behaviours

Social protection regime and IT

“Scope” axis
Private IT: An insight into the dialectic of familial solidarity and social inequality

- Question 1: International patterns of private IT and the undemonstrated link between private and public IT

- Question 2: Relative impact of household characteristics and the decisive effect of wealth

- Question 3: Distribution of IT value and intragenerational inequalities

- Question 4: Socio-economical dynamics, political dynamics, IT dynamics
IT regimes matching social protection regimes?

At least one gift

- Austria
- Belgium
- Denmark
- France
- Germany
- Greece
- Italy
- Netherlands
- Spain
- Sweden
- USA
The need of understanding IT in their macrosocial context

• To avoid both artefactual patterns and the uncontrolled use of raw Welfare State’s categories

• To correctly understand what IT practices mean

• To go beyond hasty culturalist explanations

• Sources and data limitations
  • SHARE 2004 (rel 2.2.0)
  • HRS 2004
  • OECD: LFS
IT regimes matching social protection regimes?
Setting IT back in their implementation context
Political dynamics, socio-economical dynamics, IT dynamics?

• Current evolutions
  ▪ Increasing unemployment rates for young adults
  ▪ Growing University fees and rents
  ▪ Decreasing public intervention in non-profit sectors

• Toward a shift along the 1st axis?
An insight into the dialectic of familial solidarity and social inequality

- Introduction: All roads lead to Family
- IT regimes matching social protection regimes?
- Downward IT and inequalities: the perspective of linking the structure of transfers with the transfer of social structures
“Micro” determinants and IT: wealth ownership as a predominant factor

<table>
<thead>
<tr>
<th>Chances of making a large gift (5th quintile)</th>
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IT and intragenerational inequalities

More than 67% of total value transferred

Total amounts of gifts (centiles, euros 2004)
Empirical limitations

– Survey heterogeneity and sample building

– Lack of a reliable estimation of the value transferred through cohabitation

– Lack of accurate indicators about inequality structures and « opportunity structure » for IT (inter AND intragenerational inequalities, income and wealth distributions, social mobility? ...)

– Necessity of complementary country-based work to highlight the variation of each factor’s impact according to the global configuration

– Need for longitudinal analysis to develop a « grounded » reflexion on the relation between structural, cultural and « institutional » factors in the IT case
Results

– Links between public and private IT cannot be determined without taking into account their diverse functional equivalent forms

– IT are congruent with a wider range of variables than public IT; this leads to explanations of IT patterns that do not mainly rely on differences between national cultures

– Intergenerational gifts are highly concentrated; their occurrences and amounts largely depend on the most unequally distributed resource: household wealth

⇒ Prospective remarks on IT dynamics due to current evolutions in the dimensions taken into account; general research perspective on the variation of IT’s structural effects over time... and the relation between familial solidarity and social inequality


Bibliography_2


Bibliography_3


