INHERITANCE PRACTICES: FAMILY, PROPERTY AND WEALTH TRANSFERS IN THE TWENTIETH CENTURY

Workshop held at the German Historical Institute Washington (GHI), September 15, 2017. Co-sponsored by the GHI and the Hoerner Bank AG, Heilbronn. Conveners: Jürgen Dinkel (University of Leipzig), Simone Lässig (GHI), Vanessa Ogle (University of California Berkeley). Participants: Simone Derix (University of Munich/University of Duisburg-Essen), Elisabeth Engel (GHI), Shennette M. Garrett-Scott (University of Mississippi), David Green (King’s College London), Hendrik Hartog (Princeton University), Alastair Owens (Queen Mary University of London), Ute Schneider (University of Duisburg-Essen), Elke E. Stockreiter (American University).

The examination of inheritance patterns in the twentieth century is an emerging research topic among historians. It is spurred by public and political debates in Western countries about a growing gap between the rich and the poor and the causes for social inequality. In particular, the question of inherited wealth and its relation to rising inequality over the course of the past century prompted heightened interest. However, in contrast to the public debates about unearned wealth, only little empirical research has been done on inheritance patterns in Western societies. Therefore it was one major goal of this workshop — as Simone Lässig and Jürgen Dinkel outlined in their introductory remarks — to bring together scholars who have already conducted research on inheritance patterns in the nineteenth and twentieth centuries and to discuss their arguments, methodological approaches and archival sources.

Alastair Owens and David Green presented the results of a collaborative research project analyzing the interdependencies between inheritance patterns, the state and middle-class families in England and Wales from 1850 until 1930. Both argued that for members of the middle class in England and Wales, the political and legal reforms during this period made it easier and more secure to keep property within the family. Together with social traditions and individual bequest patterns the wider legal frameworks provided incentives to keep wealth in the family. In his comment Hendrik Hartog highlighted the usefulness of the “wealthfare” concept introduced by Owens and Green. It brings policies to the foreground that support decedents to keep their wealth in the family, thus stabilizing the status quo.
Jürgen Dinkel and Ute Schneider both focused on inheritance transfers within transnational families and on property transfers across political borders. They both emphasized that migration between countries happened frequently in the nineteenth and twentieth centuries. Thus, the spatially absent decedent or heir was a common figure in inheritance transfers. In this context Dinkel analyzed inheritance transfers from the U.S. to the Soviet Union from the late 1940s until the 1970s, and Schneider examined inheritance transfers between the two Germanys. The Cold War, they found, greatly influenced transnational inheritance transfers beyond the iron curtain. Under these circumstances, international organizations and international legal experts as well as family networks became increasingly important for successful estate transfers, and some family members often overlooked in studies on families, including siblings and illegitimate children as well as nieces and nephews, became influential intermediaries, informants, and recipients of estate funds.

Simone Derix’s paper also dealt with a transnational family. Based on her research on the Thyssen family, a transnational ultra-affluent family, she also argued that the analysis of inheritance transfers must not be limited to studying last wills and testaments and the actions of decedents and heirs. Derix pointed to a vast range of rules, instruments, and institutions as well as actors involved (legal and financial advisors, notaries, etc.), that we have to bring into the picture. Furthermore, Derix provided a detailed picture of the variety of strategies related to legal matters and conflict management the Thyssen family members used to deal with inter-family property transfers. In her comment Vanessa Ogle emphasized the broader political and economic contexts in the Western capitalist world in which these transnational property transfers occurred.

Studies of inheritance tend to be rather narrowly concerned with documenting the distribution of wealth at death in understanding “who got what” in contrast to the broader range of factors all participants discussed and highlighted. In the final discussion participants pointed out three major findings of the workshop that serve to broaden this common approach: First, all of the papers stressed the equal importance of the broader political, economic and legal frameworks within which inheritance transfers occurred, as well as a broader set of actors who influenced the distribution of estates — like lawyers and attorneys, family members, friends, and transnational agencies. Second, the history of family and kinship in the twentieth century is
often described as a process stretching from the extended family to the nuclear family as the norm, and as a process through which family members were bound together less by economic calculations than by emotions. However, as became evident in all papers, family and kinship relations in the twentieth century were much broader than suggested and based on both emotions and economic calculations. Third, drawing on this observation all participants highlighted the persistence of non-market exchange into modern times. Goods and services continue to be transferred without the benefit of markets or prices, to be exchanged as gifts within (transnational) personal networks. Inheritance transfers are one type of these transactions, and thus have to be analyzed within a broader setting of property transfers.

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