Is social network analysis useful for studying the family economy?

Céline Bessière and Sibylle Gollac

Historically, the family was one of the first objects of study for network analysis. In the 1950s, Bott's research on working-class London families showed that the connectedness and density of a husband's and a wife's respective networks of kin, friends, and neighbors are positively correlated with sex role segregation in the marital relationship concerning the performance of domestic tasks, leisure activities, and interests (Bott, 1971 [1957]: 60). Following this pioneering research, studies based on networks revealed that a sense of family belonging may be built outside the nuclear family through visits, communication technologies, emotional and material expressions of care (for example money transfers and presents) (Milardo, 1988; Horst & Miller, 2005; Widmer 2010; Herz, 2015 among many others). More generally, kin relationships are a major part of social capital as they involve connections between individuals who provide material, informational, or emotional support to each other (Furstenberg, 2005; Coleman, 1988).

In this paper, we focus on the *family economy* defined as the production, consumption, and distribution of goods, assets, and services among kin (either inside or outside the household). This concept is not new. Studying the effects of industrialization in Europe, Tilly and Scott describe the transition from a household economy based on production to a family consumer economy based on wage-earning. They demonstrate that the family is still a relevant unit of analysis (Tilly & Scott, 1989 [1978]). In the 1990s, some scholars focused on mutual economic aid in kinship networks, considering them potential compensation for the weakening of the welfare state in Europe (Debordeaux & Strobel, 2002). At the turn of the twenty-first century, in the context of the decline of wage-earning society (Castel, 2003 [1995]) and the implementation of neoliberal policies, family wealth also appears as a major resource with regard to education (Khan, 2011), housing (Bugeja-Bloch, 2013), or being self-employed (Arum & Muller, 2004). Recently, macroeconomic studies have stressed the return of inheritance and gifts from previous generations in capital accumulation (Piketty, 2014).

Can social network analysis help us to understand the family economy in contemporary France? This question has been in the background of our own studies, which address the following issues. How is professional and family care organized for a dependent elderly or sick person (Weber, Gojard &Gramain, 2004)? How do families deal with real estate ownership (Gollac, 2011)? How is a family business handed over to one single heir and how do siblings accept unequal inheritances (Bessière, 2010; Gollac, 2013)? More broadly, how are family assets transferred from one generation to another? How do couples share their wealth when they break up (Collectif Onze, 2013; Bessière 2017)?

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Both of them co-authored a book drawing on a vast research on family courts in France (Collectif Onze, *Au tribunal des couples,* Paris: Odile Jacob, 2013). They currently study the material, economic and legal dimensions of family, in particular through the analysis of inheritance and marital breakdown. Their researches are at the crossroads of several fields: sociology of law and justice, sociology of gender and family, and economic sociology.

First, we show how network analysis inspires national surveys (based on individuals) in a way that allows the statistical study of the family economy beyond the predefined boundaries of households. These surveys are crucial for measuring socio-economic inequalities based on class and gender in France. Second, we discuss network analysis's conception of kin as a web of dyadic relationships. This conceptualization of the family economy emphasizes inter-individual exchanges of assets, goods, and services and tends to ignore groups. Our ethnographic studies show, to the contrary, that the family economy implies practical kin groups that can be both a resource and a burden for individuals. Third, we stress the feature of kin that is the major obstacle to network analysis: Family is not only a nexus of interpersonal relationships, but is also an institution, defined and framed by law.

Studying the family economy beyond the predefined boundaries of the household

The main contribution of social network analysis to research on the family economy is to broaden the definition of family beyond predefined boundaries. As Widmer puts it, relatives that matter cannot be defined *a priori*, using the household as a natural limit to the family (Widmer, 2010). In France, as of the 1980s, sociologists stressed the importance of the circulation of assets, goods, and services among kin, beyond the boundaries of the household (Pitrou, 1992 [1978]). Network analyses provide an interesting critique of standardized representative national surveys conducted at household level (Widmer, Aeby & Sapin, 2013).

In France, according to the French National Statistical Institute, a household designates all the occupants of the same dwelling (although they do not have to be blood-related). A first way of studying family economy beyond the household unit consists of identifying economic relationships between different households (Déchaux, 1990; Marpsat, 1991). These studies reveal a "hidden economy of kinship" (Dechaux, 1994) composed of emotional support, mutual help (housework, home improvement, childcare, eldercare, administrative assistance), and financial support. According to the French Household Wealth Survey, two-thirds of households receive a financial gift or an inheritance from another household. This applies to 95 percent of households whose reference person (most likely a man) is a self-employed professional and to only 40 percent of households whose reference person is a blue-collar worker. Amounts of gifts and inheritances also vary significantly: self-employed households whose reference person is the son of a self-employed professional receive twelve times more on average than blue-collar worker households whose reference person is the son of a blue-collar worker (Masson, 2006: 90). Informal financial support between households (such as direct loans, providing a guarantee, money transfers) mostly descends from parents to children. This informal financial support is usually followed by formal gifts and inheritance (Masson, 2006: 91). Even though elder care is an increasing concern, entry into adulthood is still the period that concentrates most family transfers (Le Goff, Navaux & Ragot, 2016). Thus, economic transfers between households tend to equalize the standard of living between old givers and young recipients (Déchaux & Herpin, 2004). The same authors show that the "hidden economy of kinship" does not reduce socio-economic inequality between classes. On the contrary, rich households are more likely to help rich households (and poor households more likely to help poor households). Compared with lower class households, upper class households receive financial help more often and in larger amounts.

In the 1990s, statisticians, demographers, and sociologists inspired by social network analysis designed new surveys centered on individuals rather than the household. In 1990, the French survey "Close friends and relatives" (*Proches et Parents*) was the first to focus on personal relationships (Bonvalet & Ortalda 2007). The interviewee (ego) is asked about the role of friends and relatives in relation to his or her academic and professional career, housing and support received in difficult moments. Three types of personal networks are distinguished: The potential family network represented by a family tree, the active network of close friends and relatives, and the support network of mutual help providers. All these lists are made by the interviewee. This new type of survey offers many advantages. First, it describes the circulation of goods and services among kin inside as well as outside households. Second, the interviewee him- or herself defines his or her network of friends and relatives without an *a priori* institutional definition of kinship. Bonvalet and Lelièvre call this the "contact circle" of an individual, which includes relatives and non-relatives and is defined through a combination of kinship ties, shared residence, and key influence during the life course (Bonvalet & Lelièvre 2016).

Another pioneering survey "Three generations" was designed in 1992 by the French Old-Age Insurance Fund (*Caisse nationale d'assurance vieillesse*) (Attias-Donfut, 1995). The survey is centered on a specific sample of baby-boomers (aged between 40 and 53 at the time of the survey) who have children and whose parents are still alive. One representative of each generation is interviewed, which is a big advantage compared with the "Close friends and relatives" survey, in which there is only one respondent. However, the list of significant relatives who potentially help is limited to direct filiation, excluding in-laws and siblings. This is a problem, given that this survey was designed to compare family solidarities with inter-generational transfers organized by the state. Thus, it presumes that all family transfers are direct filiation transfers (Masson, 2009: 21–23).

Many other recent surveys from the French National Statistical Institute collect data on personal networks at an individual level: "Kin and mutual aid networks" in 1997, "Biographies and family circles" in 2000, "Life history" in 2003, "Locations and links" in 2011, and the "Study of family and intergenerational relationships" which is the French component of the international panel "Generations and gender survey," conducted in twenty countries between 2005 and 2011. Using this type of survey one can analyze the asymmetrical position of men and women in mutual aid configurations. Jonas and Le Pape show that women are more likely to help their parents than men, even when they live far away from them. Thus, households favor exchanges with the female partner's relatives rather than the male partner's relatives (Jonas & Le Pape, 2008).

By examining differences between these surveys, one can also discern their shortcomings. First, some of them draw up a restricted list of relatives involved in the family economy, whereas others open up the definition of significant help providers to relatives and non-relatives designated by the interviewee. Second, concerning the types of goods, services, and assets exchanged, all these studies are limitative: They better describe services and informal financial help than actual wealth transfers (inter-vivo gifts, inheritance, liquidation of a property). Third, most of them explore family networks only from a single point of view, that of the respondent, asking him or her many questions about parents, partners, siblings, as well as children and grandchildren.

On this respect, the "Three generations" survey is an exception because it is based on three points of view for each family. Attias-Donfut points out: "The results are disquieting. By confronting the answers of the one who gives and the one who receives, one realizes that some things seem to be given without ever being received, and received without ever being given. This entails that facts and perceptions, perceived and actual exchanges, must be distinguished" (Attias-Donfut, 1995: 70). The meaning and perceived direction of financial transfers, material support, and mutual aid among kin depend on the point of view. This is better shown by ethnography.

From dyadic relationships to practical kin groups

Network analysis considers kin to be a sum of dyadic relationships and tends to ignore groups. However, our research shows that the family economy is not organized like a sum of inter-individual exchanges of assets, goods, and services. We prepared family monographs based on multiple semi-structured long interviews with different relatives, at intervals of several months or years. A given family situation is described from multiple points of view (Weber, Gojard & Gramain, 2003). Our interviewees authorized us to participate to ordinary and exceptional moments of their family life: Drinks and meals with friends, neighbors or relatives, private parties, wedding ceremonies, funerals. They gave us access to some of their private archives (family trees, letters, notary legal acts, inheritance files, divorce files, family pictures).

The Le Vennec are a working-class family in Brittany. In the monograph, we observe a complex circulation of goods and services between family members (Gollac, 2003). Born in 1931, Jeanne Le Vennec is the wife of a manual worker in the construction sector, and the mother of seven children. She provides housing to several of her adult children and their partners. Being a home-based child care provider, she takes care of her grand-children for free, at the same time as other children of the neighborhood. Her husband was treated at home for cancer for several years, before dying. From the beginning of his illness, two of Jeanne's children helped her on a daily basis: Her son Eric with gardening and home improvement and her daughter Dominique with housework and cooking. Other children give a hand from time to time. When her daughter Anne-Marie was treated for cancer, she moved into the family house for a couple of years. Her son Marc, who was diagnosed with schizophrenia, now lives in the family house. In this family, helping each other is not regulated by a logic of personal gift and counter-gift between individuals. To the contrary, we observe a practical kin group that joins individuals together by pooling resources.

Following Folbre (1986), Douglass (2006), and Weber (2003) we call this "*householding*" to convey the understanding that creating and sustaining a household is an ongoing, dynamic social process. It may involve fictive as well as actual kin, distant as well as under-the-roof members, and hired domestic helpers and nannies who become household members. In most cases, *householding* implies cohabitation or short-distance residence, but the Le Vennec case shows that cohabitation can also be sporadic. Another criterion is the fact that one or several "common causes" rally the members of these practical kin groups. These "common causes" are more or less demanding and more or less circumscribed in time (from a daily routine to an exceptional event). They include: Raising and educating children; maintaining a house on a daily basis; dividing labor and pooling income from livelihood activities; caring for elderly and other non-working household members; caring for sick or disabled people; and running a family business. The exchange relationship is not established between two individuals, but between an individual and a group. When an individual gives a hand to the group then he or she can expect that the group will take care of him or her in case of need.

Practical kin groups are concerned with economic production and social reproduction. Some groups rally relatives on the issue of wealth transfers from one generation to another, and more broadly the handing over of a social position in a lineage. The following case comes from an ethnographic study of the taking over of family businesses by young wine-growers in the Cognac region (Bessière, 2010: 189 and following). The de Roumarie family belongs to the local gentry. The parents own a large wine-growing farm, several houses that they rent out, and a seventeenth-century castle. They live there with one of their sons, Alain, his wife, and his two children. Alain is the only child who works on the family farm. In 2000, Alain asked his parents to start planning their inheritance through an inter-vivos gift. He wanted the castle to be his in order to do construction work inside. However, the value of the castle was too sizeable to be completely compensated by the other assets. Thus, compared with his siblings, Alain was legally advantaged in the sharing. His siblings found it unfair. Alain defended himself by saying he was the only one who had agreed to live in the castle all year round and take care of the family business. His brother suggested that Alain took over the farm only because of his poor results at school, whereas his other siblings worked hard at university and are now all senior executives or wives of senior executives in the Paris area.

In this case, the parents could have chosen to favor equity and reciprocity between the siblings. They preferred to guarantee the preservation of important assets such as the castle and the wine-growing family business in the lineage. These assets are the embodiment of the social status of the practical kin group. These unequal family wealth arrangements are common in the Cognac area and favor male heirs who take over the family business. The family economy cannot be reduced to inter-individual relationships. To understand the circulation of wealth among kin, one has to study the relationships of individuals to family groups, especially if they share or do not share the logic of reproduction of a social status.

It is worth noticing at this point that being part of these practical kin groups is both a resource and a burden for individuals. In the de Roumarie family, Alain benefits from a job opportunity and a social status he would not have had without the handing over of the family business, but at the same time is morally and materially trapped in the family castle.

Are kin relationships like other relationships? From networks to institutions

The conceptualization of family as a social network presumes strong hypotheses on kin relationships. Network structures are characterized by *nodes* (individuals) and *ties* that connect them. Social network analysis does not presume that these ties are all the same. However, it does suggest that a comparison is possible between them, as shown by the classical opposition between limited strong tie networks and extended weak tie networks (Granovetter, 1973).

On the contrary, the anthropology of kinship differentiates ties and individuals. Kinship diagrams, introduced in the nineteenth century (Morgan, 1871), represent individuals and links between them according to kin relationships. They look like social network diagrams. However, kinship diagrams are based on radically different premises. First, lines connecting individuals are either horizontal (when they represent affine bonds between conjugal partners or sibling bonds) or vertical (connecting parents to children). Thus, kinship diagrams assume that the distinction between the different generations is crucial. Second, affine bonds (between conjugal partners, either married or not) are represented by a double line, thus distinguished from descent bonds and sibling bonds. For Lévi-Strauss, a system of kinship is characterized both by filiation rules that associate individuals to a group, and by alliance rules that organize the exchanges – in particular, of women – between these groups (Lévi-Strauss, 1969 [1949]). Third, kinship diagrams make systematic distinctions between individuals. One distinction is between males represented by triangles and females represented by circles, but other differences are drawn, such as the one between elder and younger siblings.

Compared with social network analysis, kinship diagrams stress the nature of relationships between individuals (alliance, filiation, sibling bonds, direction of the domination) rather than their mere existence or density. Social network analysis presumes that the denser or more extended an individual's network, the more dominant he or she is. However, the size of one's kin network is not always a resource. Studies show that being a single (male) child is an advantage for academic success but also for receiving an inheritance, and especially taking over a family business (Gollac, 2013). Distinguishing between generations and sex is crucial to apprehend the relations of domination among kin.

This comparison sheds light on the other major obstacle faced by network analysis in studying the family economy, which is that it ignores the fact that family is an *institution* (Bourdieu, 1996 [1993]; Lenoir 2008). In other words, family is not only a nexus of interpersonal relationships, but is also defined by law. Kinship bonds are not always elective ones, some cannot be severed. In Western societies, for instance, marital breakdowns are frequent (and more or less facilitated depending on marital status and the national state of law), but loss of parental authority is extremely rare. Kinship bonds are also associated with rights and obligations.

In France, according to the Civil Code "children owe maintenance to their father and mother or other ascendants who are in need" (Art. 205), and "sons- and daughters-in-law owe likewise and under the same circumstances, maintenance to their father- and mother-in-law" (Art. 206), "in proportion to the needs of the one who claims it, and to the wealth of the one who owes it" (Art. 208). How does this legal frame shape practical kin groups of care providers for elderly people? A research team took up the challenge of exploring systematically different points of view in the network of elderly dependent people with memory and behavioral disorders: The main care provider, the other professional and family care providers (practical kin group), as well as all the relatives under the legal obligation of maintenance (legal kin group) (Gramain, Soutrenon, & Weber, 2006).

In matters of wealth, family is framed by matrimonial property regimes and inheritance law, which varies from one country to another (Beckert, 2008 [2004]). Under French law, descendants of the deceased (children, grandchildren, and so on, in order of priority), and the spouse of the deceased when there are no descendants, are entitled to a reserved portion. When there is no will, the Civil Code imposes an order of succession.[1] In practice, fiscal law is also a major constraint: Depending on who is the recipient of the assets, the percentage of estate tax will vary a lot. If – in theory – a single person with no children can bequeath all his or her estate through a will to his or her unmarried partner, in practice the estate will be taxed at a level of 60 percent, whereas this level would be null if they were married. This was one of the issues at stake when France legalized same-sex partners' right to marry in 2013.

Law is a major constraint on the circulation of wealth among kin. This legal frame of the family economy imposes itself at specific moments, limited in time: When one parent moves into a retirement home, when one organizes estate planning, or when a couple splits up. However, during long periods of family life, practical relationships among kin can ignore the legal rules (Weber, 2013). When practical kinship confronts legal kinship, things can become ugly. Drawing on legal files from US courts, Zelizer discusses cases in which, for example, children of a wealthy businessman sue their father's third wife who was the principal beneficiary of his $400 million fortune in 2000 (p.158), or a father refuses to pay for the college education of his son because they lost touch after his divorce (p. 209) (Zelizer, 2005).

Like Zelizer, we study moments in which kin describe the intimate transactions involved in their relationships, and try to have these descriptions endorsed by the law. Thus, we focus on law in action. We study estate planning and marital breakdowns because these are two moments at which wealth is distributed among kin. We call these moments *family wealth arrangements*. We show how notaries and lawyers can play with family and tax law behind closed doors. Wealthy families and their counselors have the power to blur the distinction between what is legal and what is not, in order to undervalue wealth for tax purposes, while protecting assets. Legal professionals are important actors in the family economy. For example, they advantage the wealthier spouse or heirs in the family: Most of the time, men over women (Bessière & Gollac 2017; Bessière 2017).

To conclude, Bott's pioneering book *Family and social networks* showed in 1957 how spouses' personal networks affect marital relationships. Many decades later, social network analysis challenged the way surveys collect statistical data on the family, deconstructing the predefined household boundaries. However, in this paper, we also pointed out the shortcomings of this approach, mainly the difficulty of taking into account institutional dimensions and power in kin relationships, as well as collective logics of practice crucial to the family economy.

Endnote

1 As follows: if the deceased had no spouse and left children, the estate passes to the descendants in equal shares (Art. 734 and 735 of the Civil Code). If the deceased was single and had no children, the estate passes to the parents of the deceased, his brothers and sisters and their descendants (Art. 738).

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