


# A legal perspective on inheritance of joint property: a comparative analysis of various legal systems

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| ARTICLE INFO   | ABSTRACT  |
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| <p><b>Article history:</b></p> <p>Received: 19, Dec, 2024<br/>Revised: 09, Jan, 2025<br/>Accepted: 29, Jan, 2025</p> <p><b>Keywords:</b></p> <p>Gender Justice;<br/>Inheritance Law;<br/>Inheritance Regulation;<br/>Joint Property Inheritance;<br/>Legal System.</p> | <p>Joint property inheritance is a complex issue in various legal systems around the world, reflecting the different principles and approaches between Civil Law, Common Law, Islamic law, customary law, and hybrid legal systems. This research aims to comparatively analyze the legal perspectives on inheritance of joint property in various legal systems, highlighting the main principles, application in various countries, and regulatory challenges that arise. The method used is a systematic literature review, by analyzing legal documents, court decisions, and relevant academic studies. The results show that in Civil Law, the distribution of inheritance generally follows written legal rules that strictly regulate the rights of heirs, while in Common Law, testamenter freedom is dominant, although it can be corrected by the court. In Islamic law, the faraid system regulates the distribution of inheritance based on religious decree principles, while in customary law, cultural norms and community values often influence inheritance patterns. In countries with pluralistic legal systems, such as Indonesia, Malaysia and Nigeria, regulatory disharmony can lead to inheritance disputes, especially in terms of gender imbalance and jurisdictional conflicts between national, customary and religious laws. This research confirms the importance of regulatory harmonization to create a more inclusive and equitable inheritance law system. Legal reforms that accommodate gender equality, legal certainty and administrative efficiency are strategic steps in facing the challenges of inheriting joint property in the modern era. With a deeper understanding of these different legal systems, it is hoped that legal policies can be developed to reduce inheritance disputes and improve the protection of the rights of all parties involved.</p> <p><i>This is an open access article under the CC BY-NC license.</i></p>  |

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## 1. INTRODUCTION

Inheritance of joint property is a complex legal issue and varies across different legal systems in the world. Differences in legal approaches to marital property and how it is distributed after the death of one spouse often lead to disputes(Nukusheva et al., 2024). In Civil Law legal systems, such as in France and Germany, joint property is generally governed by the marital agreement or applicable law, with the division determined by law. Meanwhile, in Common Law, such as in the United States and the United Kingdom, the concept of joint ownership is more flexible, with a tenancy by the entirety or joint tenancy approach, which allows the surviving spouse to automatically become the sole owner of the joint property without the need for inheritance(Gafarova, 2023).

On the other hand, in the Islamic Legal system, inheritance is governed by the faraid law which divides property proportionally to the heirs determined by the Qur'an and hadith. The concept of joint property is not explicitly recognized in classical Islamic law, so in many cases, national legal systems in

Muslim countries adopt certain modifications to accommodate the division of marital property (Wardi et al., 2024). Meanwhile, in Customary Law, such as in Indonesia and some African countries, the inheritance of joint property often depends on local cultural norms and practices, which can differ significantly between regions. This pluralistic legal system often leads to disharmony in the application of inheritance rules, especially in cases of intercultural or cross-border marriages. The issue of inheritance of joint property is increasingly complex with globalization and the increase in mixed marriages between countries with different legal systems. Differences in legal interpretation and jurisdictional conflicts often lead to legal uncertainty for heirs. In addition, issues such as gender equality in the division of inheritance, the existence of marital agreements, as well as legal protection for surviving spouses are major challenges in various legal systems (Otu & Nabiebu, 2021). Therefore, an in-depth comparative study is needed to understand the similarities and differences in the regulation of inheritance of joint property in various countries and explore the possibility of legal harmonization to provide better legal certainty for the Community.

The urgency of research on inheritance of joint property in various legal systems is based on the increasing legal complexity in modern societies that are increasingly global and multicultural. With the increasing mobility of people between countries and the rise in the number of mixed marriages, differences in legal rules regarding the ownership and inheritance of joint property often lead to legal uncertainty for spouses and heirs (Buțoreanu-Cârpușor, 2021). In some cases, inheritance disputes result from overlapping rules between national law, religious law and customary law, which can lead to injustice or protracted legal proceedings. Therefore, this research is important to identify the similarities and differences in the principles of inheritance of joint property in various legal systems in order to find a more harmonious and fair solution.

In the context of modern law, the main challenge is how to ensure justice for all parties in the division of inheritance of joint property, especially in the context of legal pluralism. Some legal systems have undergone reforms to adapt to social developments, such as the recognition of the rights of unmarried couples or the rearrangement of inheritance rights in Islamic and customary legal systems. However, there are still gaps in legal protection for surviving spouses, especially for women in some legal systems that still apply patriarchal rules (David & Brierley, 1978). Systematic comparative studies can help formulate legal policies that are more inclusive and responsive to the needs of modern society. The relevance of this research is also related to legal harmonization efforts in the international sphere. International legal organizations, such as the United Nations Commission on International Trade Law (UNCITRAL) and the Hague Conference on Private International Law (HCCH), have discussed various aspects of cross-border civil law, including inheritance issues (Yunatskyi & Shepeliuk, 2023). By understanding the various legal approaches to inheritance of joint property, this research can contribute to the development of regulatory models that can be applied in various jurisdictions. In addition, the results of this research can also serve as a guide for policy makers, legal practitioners, and the public in understanding their rights and obligations related to inheritance of joint property, so as to reduce potential disputes and increase legal certainty for all parties (Wicaksono & Hosein, 2024).

This research aims to analyze and compare legal arrangements related to inheritance of joint property in various legal systems, including Civil Law, Common Law, Islamic Law, and Customary Law. By conducting a comparative study, this research seeks to identify similarities and differences in legal approaches to the division of joint property after the death of one spouse (Abdillah et al., 2024). In addition, the research aims to explore how different legal systems address complex issues such as the rights of surviving spouses, the protection of women, as well as the legal implications in mixed marriage cases (Nukusheva et al., 2024). The findings of this research are expected to provide recommendations for policy makers in formulating rules that are more harmonious and responsive to the dynamics of modern society. The main issue raised in this research is the non-uniformity of legal rules governing the inheritance of joint property in various jurisdictions, which often leads to legal uncertainty and disputes between heirs. For example, in the Common Law system, the principle of right of survivorship allows the surviving spouse to be the sole owner of joint property, while in Civil Law, the division of property is mostly regulated based on marital agreements or state law provisions. On the other hand, in Islamic Law, inheritance is distributed in accordance with faraid law, which does not explicitly recognize the concept of joint property (Raková et al., 2024). This disharmony becomes more complicated in the case of cross-border marriages or in pluralistic legal systems, where more than one legal system may apply simultaneously.

In addition, this research also seeks to highlight the legal and social challenges that arise as a result of joint property inheritance rules that are not always fair to all parties. In some legal systems, women often face limitations in their inheritance rights, especially in patriarchal legal systems. On the other hand, the absence of clear regulations in some jurisdictions regarding inheritance of joint property can cause legal difficulties for couples who do not have a marital agreement or for individuals who are in informal relationships. Therefore, this research seeks to provide greater insight into how the law can adapt to create a balance between the protection of individual rights and legal certainty in the division of joint property inheritance (Gaol, 2024).

## 2. RESEARCH METHOD

This research uses the comparative legal research method to analyze how inheritance of joint property is regulated in various legal systems, including Civil Law, Common Law, Islamic Law, and Customary Law. This method aims to identify patterns, similarities, and differences in the regulation of joint property inheritance, as well as evaluate the resulting legal implications (Khairunnisa et al., 2024). A comparative law approach is used to understand the conceptual and practical differences of inheritance in various jurisdictions, while a systematic literature review assists in compiling a strong theoretical and normative base. Data was collected through primary and secondary legal sources, including legislation, court decisions, scholarly journals, law books, as well as reports from international organizations such as the Hague Conference on Private International Law (HCCH) and the United Nations Commission on International Trade Law (UNCITRAL) (Suwarta et al., 2022). Articles used in the literature review will be selected based on strict inclusion and exclusion criteria, taking into account their relevance, publication quality (Scopus or Web of Science indexed journals), as well as their recency in discussing joint property inheritance. Data analysis was conducted using a legal doctrinal research and socio-legal analysis approach, which combines normative studies of legal texts with a broader social perspective. The doctrinal approach is used to examine the legal principles governing joint property inheritance in various legal systems, while socio-legal analysis helps in understanding the impact of legal rules on society and their implications in practice (Djawas et al., 2022). The results of this research will be synthesized to formulate legal recommendations that can support the harmonization of common property inheritance regulations in various jurisdictions, thus providing better legal certainty for individuals and families in the era of globalization.

## 3. RESULTS AND DISCUSSIONS

### 3.1. Legal Perspective on Inheritance of Joint Assets According to the Civil Law Legal System

The Civil Law legal system, rooted in the Roman legal tradition and developed in many European countries such as France, Germany and the Netherlands, has a more structured approach to the inheritance of joint property. In this system, the rules regarding the ownership and division of joint property are strictly regulated in civil law codifications, such as the French Code Civil or the German Bürgerliches Gesetzbuch (BGB). Generally, under the Civil Law system, marital property is considered to be the collective assets of the couple, unless there is a marital agreement stipulating the separation of property. Upon the death of one of the spouses, the inheritance of the joint property will be divided between the surviving spouse and other heirs in accordance with the provisions of the applicable inheritance law, taking into account forced heirship rights that protect the rights of children and close relatives (Liman & Rifai, n.d.).

In practice, Civil Law legal systems adopt various marital regimes that determine how joint property is inherited. For example, in France, there are three main systems: community of property, separation of property, and participation in acquisitions, each of which gives effect to the division of inherited property (Ticău-Suditu, 2021). If the couple does not make a specific agreement, the default system is usually community of acquests, where property acquired during the marriage is considered joint property and is divided upon the death of either spouse. Similar rules are also found in Germany, where the Zugewinnngemeinschaft (community of accrued gains) system allows the surviving spouse to receive a certain share of the profits acquired during the marriage before the distribution of the estate to the other heirs (El Khalfi et al., 2019). The advantage of the Civil Law system in regulating inheritance of joint property lies in the higher legal certainty, as every aspect of inheritance has been clearly codified

in law. However, this system can also pose challenges in certain cases, such as cross-border marriages or conflicts between national law and religious law, especially in countries with pluralistic legal systems. In addition, the strict principle of forced heirship can limit a person's freedom in determining their heirs through a will. Therefore, although this system provides protection for heirs, it still requires legal reform and flexibility to adjust to modern social and economic dynamics (Abubakari et al., 2019).

In the Civil Law system, the main principle of inheritance of joint property is based on the concept that property acquired during marriage is considered as joint property, unless otherwise specified in the marital agreement. This principle is known as community property or joint marital property, where both spouses have equal rights to the assets acquired during the marriage. After one spouse dies, the inheritance of joint property does not necessarily belong to the heirs completely, but must be divided in accordance with the applicable civil law provisions. In many Civil Law countries, the surviving spouse retains rights to most of the joint property before the rest is distributed to other heirs, such as children or close family (Redi & Antasari, 2022). The principle of forced heirship is also characteristic of the Civil Law system, which limits individual freedom in determining the distribution of inheritance through wills. Under this principle, a certain share of the estate must go to mandatory heirs, such as children and surviving spouses, without being overridden by the testator's personal wishes. For example, in the French Civil Code, at least half of the estate must go to children if the testator has one child, two-thirds if he has two children, and three-quarters if he has three or more children. This principle aims to ensure that the immediate family receives legal protection in the distribution of the estate and prevents the unfair transfer of assets to third parties through wills (Rasdiana & Subha, n.d.).

In addition, the Civil Law system also provides a protection mechanism for the surviving spouse through the concept of usufruct, which entitles the surviving spouse to use or enjoy the proceeds of the estate without having full ownership of the assets. This principle allows the surviving spouse to remain in the family home or receive economic benefits from the inherited property, even though legal ownership may have been transferred to other heirs. With the combination of the principles of community property, forced heirship and usufruct, the Civil Law system seeks to create a balance between the rights of the surviving spouse and legal certainty for the heirs, although in practice there are often challenges in adapting these rules to the needs of modern society.

In France, the system of inheritance of joint property is regulated in the Code Civil with the community of acquests approach as the default rule for couples who do not make a marital agreement. Under this system, property acquired during marriage is considered joint property and must be divided equally when one spouse dies (Sekotibo, 2021). France also applies the principle of forced heirship, which requires that a certain portion of the estate be given to the children of the testator. If the deceased spouse has children, the surviving spouse has the choice between receiving usufruct over the entire estate or obtaining a fixed share in the division of the estate. This provision ensures that the surviving spouse retains economic security, while the children's rights as heirs are protected.

### **3.2. Legal Perspective on Inheritance of Joint Property according to the Common Law Legal System**

In the Common Law legal system, inheritance of joint property is governed by the principles of individual and contractual ownership, which differs from the Civil Law system which is more structured in legal codification. The main concepts in this system are tenancy by the entirety and joint tenancy with right of survivorship, which allow the surviving spouse to automatically become the sole owner of the joint property upon the death of the other spouse (El Khalfi et al., 2019). This principle aims to ensure continuity of ownership without the need to go through the lengthy and complex process of probate. However, if the ownership of the property is based on tenancy in common, the share of the property owned by the deceased spouse will be inherited to the heirs in accordance with the provisions of the applicable inheritance law or based on the will made earlier.

In addition, in Common Law, if a person dies intestate, the division of the estate will follow the rules of inheritance law established by the state or country where the testator lived. For example, in the

United States and the United Kingdom, the surviving spouse usually receives most of the inheritance, but the division may differ depending on whether the testator has children or other heirs. Differences in regulations between jurisdictions in the Common Law system can lead to legal conflicts in cross-border inheritance cases, especially for couples who have assets in different countries. Therefore, this system relies heavily on good legal planning, including the drafting of wills and clear property ownership agreements, to avoid prolonged inheritance disputes (Chang et al., 2021). One of the main differences between the Common Law and Civil Law systems in the inheritance of joint property is the approach to property ownership and distribution. In the Civil Law system, property acquired during marriage is generally considered to be the joint property of the spouses, unless otherwise specified in the marital agreement. Upon the death of either spouse, the joint property will be divided in accordance with the provisions of codified inheritance law, including the rules of forced heirship, which ensure that children and the surviving spouse receive a certain share of the estate. In contrast, under the Common Law system, property ownership is more individualized, and couples can choose various forms of joint ownership, such as joint tenancy with right of survivorship, which allows the surviving spouse to automatically become the full owner of the joint property without the need to go through probate proceedings.

The second difference lies in the freedom of the testator in determining the heirs. In Civil Law, the rule of forced heirship limits the freedom of individuals in dividing their inheritance, so the testator cannot completely ignore the rights of their spouse or children. Meanwhile, in Common Law, the principle of testamentary freedom allows the testator to distribute the assets as he or she wishes through a will. Although there is legal protection for the spouse or dependent children of the testator through the mechanism of family provision claims, basically the Common Law system provides greater flexibility in inheritance planning, so that the testator can allocate his assets to parties outside the nuclear family, including friends, charitable organizations, or other institutions (Redi & Antasari, 2022). In addition, another difference is seen in the process of settling inheritance. In Civil Law, the distribution of inheritance is done based on clear and systematic legal rules in the civil code, so the administration process is often more straightforward although it still requires legal validation. In contrast, in Common Law, if a person dies intestate, a more lengthy and complex probate process may be required to determine the division of inheritance in accordance with local law. In addition, regulatory differences between jurisdictions in the Common Law system can lead to legal challenges in cross-border inheritance cases, whereas the Civil Law system, which is more uniform in its codification, can be more straightforward to administer.

### **3.3. Legal Perspective on Inheritance of Joint Property according to the Perspective of Customary Law and Hybrid Systems**

In many societies, customary law systems play an important role in determining the division of inheritance, especially in countries with legal pluralism. Customary law is often rooted in local traditions and social norms that have evolved over centuries, often differing from codified Civil Law, Common Law or Islamic law systems. For example, in some indigenous communities in Africa and Southeast Asia, inheritance can be based on a patrilineal system where property is passed down primarily to the men in the family, or matrilineal where women have primary rights to family property. In Indonesia, customary laws of inheritance are still used in some societies such as in Minangkabau, which applies a matrilineal system, where property is inherited to the daughters in the family (Abubakari et al., 2019). However, in many countries, these customary laws often clash with national or religious laws, which can lead to complexities in the resolution of inheritance disputes.

In the context of Hybrid Systems, some countries combine various legal systems in regulating inheritance of joint property. In South Africa for example, the inheritance law system is a blend of Common Law inherited from British colonialism, African customary law and Islamic law for the Muslim community. As a result, in inheritance cases, courts have to consider which aspect of the law is more dominant or relevant to the testator and his/her heirs (Molepe & Odeku, 2023). The same is true in India

where inheritance laws vary by religion-Hinduism, Islam, Christianity and Sikhism each have their own rules, while customary law also still has influence in certain communities. These hybrid legal systems often require courts to balance between different legal principles that may conflict, resulting in complex decisions that are more inclusive of the country's legal diversity(Ayitio, 2019).

One of the main challenges in customary and hybrid legal systems is legal certainty and the protection of inheritance rights. In many countries with legal pluralism, such as Nigeria and the Philippines, differences between customary and national laws can lead to uncertainty in the division of inheritance, especially when there is no clear documentation or when there are disputes between heirs. Therefore, many countries have tried to codify or reform their inheritance systems to make them more uniform and fair to all parties. Some countries, such as Malaysia and Indonesia have adopted an approach where customary law is still recognized but is subject to applicable national law or religious law. With this approach, the state can ensure that customary principles are still respected, but within a more modern and transparent legal framework to avoid protracted inheritance disputes.

### **3.4. Challenges in the Regulation of Joint Property Inheritance**

The regulation of joint property inheritance faces various legal and social challenges especially in legal systems that have pluralism, such as a combination of customary law, religious law, and national law. One of the main challenges is the non-uniformity of legal rules in the distribution of inheritance, especially in countries where more than one legal system applies. For example, in Indonesia and Malaysia inheritance law may follow Islamic law, customary law, or civil law, depending on the background of the testator and the heirs. These differences often lead to legal uncertainty and potential disputes between heirs of different faiths or who wish to use the legal system that is more favorable to them(Thakur et al., 2020).

Another challenge is gender inequality in inheritance rights, especially in legal systems that still prioritize the division of inheritance based on gender or certain family relationships. In some customary and religious legal systems, women often receive a smaller share of inheritance than men, or do not even have direct inheritance rights over joint property. Although many countries have made legal reforms to improve gender equality in inheritance, such as in Tunisia and Egypt there is still resistance from conservative groups who want to maintain traditional rules. On the other hand, in the Common Law legal system where there is freedom in determining heirs through wills, there is often injustice when surviving spouses or children do not get a sufficient share because the testator chooses to distribute the estate to other parties(Kalabamu, 2019).

In addition, a major challenge in the regulation of inheritance of joint assets is the complex administrative and bureaucratic process especially in legal systems that require probate or legal validation before assets can be inherited. In many countries, such as in the United States and the United Kingdom, the probate court process can take years, especially if there are disputes or if the testator does not have a clear estate plan. In developing countries, these administrative challenges are compounded by the lack of legal documentation of ownership, making it difficult for heirs to claim their rights. In many cases, protracted inheritance disputes not only hamper the distribution of assets, but can also lead to prolonged family conflict. Therefore, legal reforms that ensure certainty, fairness, and efficiency in the distribution of inheritance are of paramount importance in modern legal systems(Yustiardi et al., 2020).

Countries with pluralistic legal systems often face challenges in harmonizing the various inheritance rules originating from customary law, religious law, and national law. For example, in Indonesia inheritance law can follow Islamic law, customary law, or civil law depending on the background of the testator and the heirs. However, in many cases, uncertainty over which law applies can lead to prolonged disputes, especially when heirs have different legal preferences or feel aggrieved by either system. As a result, the process of settling inheritance can be complicated and require court intervention to determine the most relevant law(Agarwal et al., 2021).

In some countries such as Malaysia and Nigeria regulatory disharmony is also an issue in the context of the relationship between Islamic law and civil law. In Malaysia, for example, the Syariah Court has jurisdiction over the distribution of inheritance for Muslims under Islamic law, while the civil courts deal with the broader administration of estates. This can lead to jurisdictional conflicts, especially if there are non-Muslim parties involved in the inheritance dispute. In Nigeria, inheritance law for Muslims follows Islamic law, while communities that follow customary or Common Law have different systems. These differences often lead to legal uncertainty, especially in cases of mixed marriages or when individuals convert before dying, leaving inheritance status unclear and triggering disputes between heirs (Ha et al., 2023).

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#### 4. CONCLUSION

Inheritance of joint property is a complex issue in various legal systems in the world, with different approaches in Civil Law, Common Law, Islamic law, customary law, and hybrid legal systems. In the Civil Law system, the distribution of inheritance tends to follow the rules of written law that strictly regulate the rights and obligations of heirs, while in Common Law the testator has more freedom in determining the distribution of property through a will, although there is a court mechanism to correct injustice. In Islamic law, the distribution of inheritance is governed by the principle of faraid, which although strict, still provides room for the testator to allocate part of the property through a will within certain limits. Meanwhile, customary law often reflects the cultural and social values of a community, which in some cases can conflict with principles of equality and national law. This difference in approach poses various challenges in the regulation of inheritance of common property, especially in countries with legal pluralism. Gender imbalance in the distribution of inheritance is still a prominent issue, especially in systems that traditionally favor men as the main heirs. In addition, disharmony between national law, religious law and customary law often leads to jurisdictional conflicts and legal uncertainty, prolonging the inheritance settlement process. Countries with pluralistic legal systems, such as Indonesia, Malaysia, Nigeria and India face a major challenge in harmonizing the various legal systems in order to create justice for all parties involved. To overcome this challenge, reform of inheritance laws is an indispensable step, especially in the aspects of legal harmonization, protection of women's rights, and simplification of bureaucracy in inheritance settlement. Some countries have adopted a more flexible approach by adjusting their legal systems to be more inclusive, for example by giving greater rights to surviving spouses and ensuring gender balance in the distribution of inheritance. In the modern era, it is important that legal systems continue to evolve to create inheritance regulations that are fairer, more transparent and can be effectively applied in an increasingly complex and multicultural society.

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