

Do Inheritance Customs Affect Political and Social Inequality?



Anselm Hager University of Konstanz
Hanno Hilbig Harvard University

Abstract: *Why are some societies more unequal than others? The French revolutionaries believed unequal inheritances among siblings to be responsible for the strict hierarchies of the ancien régime. To achieve equality, the revolutionaries therefore enforced equal inheritance rights. Their goal was to empower women and to disenfranchise the noble class. But do equal inheritances succeed in leveling the societal playing field? We study Germany—a country with pronounced local-level variation in inheritance customs—and find that municipalities that historically equally apportioned wealth, to this day, elect more women into political councils and have fewer aristocrats in the social elite. Using historic data, we point to two mechanisms: wealth equality and pro-egalitarian preferences. In a final step, we also show that, counterintuitively, equitable inheritance customs positively predict income inequality. We interpret this finding to mean that equitable inheritances level the playing field by rewarding talent, not status.*

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Why are some societies more unequal than others? One salient driver of inequality, put forth by the French and American revolutionaries, is inheritance customs. Influential thinkers like Tocqueville and Jefferson believed that the equal distribution of wealth among siblings was key in order to achieve broader social and political equality. By contrast, inequitable inheritance customs—particularly *primogeniture*, the passing of wealth to the oldest son—were accused of creating strict social hierarchies. In 1790, the French revolutionaries therefore abolished primogeniture. Their declared goal was to empower women and to put an end to aristocratic domination.

Do equitable inheritances succeed in leveling the societal playing field? This article empirically explores Tocqueville's hypothesis. Our evidence comes from Germany—a country with pronounced local-level variation in historic inheritance customs. Particularly in

Germany's southwest, inheritance customs regularly varied from one village to the next. Germany thus offers a rich laboratory to assess whether equitable inheritance customs, indeed, engender equality. Specifically, we assess whether historic inheritance customs predict today's gender and class equality in the political and social realm.

Using fine-grained data from Western Germany, we confirm that equitable inheritance customs are associated with greater social equality: Municipalities that historically fairly apportioned wealth among siblings elect more women into local political councils and have fewer aristocrats in local elite clubs (Rotary International). The result is robust to a variety of empirical specifications, including a geographic matching procedure and three separate instrumental variable regressions, which leverage different theories about the emergence of equitable inheritance customs.

Anselm Hager is Assistant Professor of Political Economy, University of Konstanz, Graduate School of Decision Sciences, and Department of Politics and Public Administration, 78457 Konstanz, Germany (anselm.hager@uni-konstanz.de). Hanno Hilbig is PhD candidate, Harvard University, Department of Government, 1737 Cambridge Street, Cambridge, MA 02138 (hhilbig@g.harvard.edu).

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In a second step, we explore two mechanisms that help explain this finding. Tocqueville and other revolutionaries argued that equitable inheritance customs engender social and political equality (a) by fairly apportioning wealth and (b) by spurring pro-egalitarian preferences. We explore both mechanisms using historic data sources. Regarding wealth inequality, we confirm that equitably inheriting municipalities had lower levels of land inequality in 1895. Regarding pro-egalitarian preferences, we confirm that equitably inheriting municipalities were more likely to support Communists during the Weimar Republic.

In a final step, we explore whether equitable inheritance customs also predict income inequality. We measure local-level income inequality using heretofore untapped data from German tax records in 2014. Counterintuitively so, we find that equitable inheritance correlates *positively* with income inequality. We interpret this finding to mean that equitable inheritance fosters political and social equality, but not economic equality. It thus achieved what the American revolutionaries had intended: an “egalitarianism [...] among pioneers, [whose] only inequalities were those of ability” (de Visme Williamson 1976, 102).

The outcomes discussed in this article connect to several debates in political science. First, the article draws attention to inheritance customs as a pivotal institution that shapes societal outcomes. Whereas sociologists and historians have recognized their profound influence, political scientists have mostly focused on the effects of inheritance customs on regime stability (Gates et al. 2006; Kokkonen and Sundell 2014) and political violence (Lichbach 1989). Our article demonstrates that inheritance customs also predict why some polities are more equal than others. Second, we add to a literature scrutinizing wealth and income inequality, pointing to inheritance customs as a salient predictor (Boix 2010; Piketty 2014). Third, we present a new explanation for variation in representation of women in political offices (Davidson-Schmich 2016; Gilardi 2015; Kostadinova 2007; Lawless and Fox 2010). Last, our article connects inheritance customs to pro-egalitarian preferences and, by extrapolation, preferences for redistribution (Alesina and La Ferrara 2005; Scheve and Stasavage 2006).

Theory

In 1790, at the height of the French Revolution, the French Constituent Assembly partly abolished primogeniture—the passing of wealth to the firstborn child. The revolutionaries’ declared goal was to overcome the strict political and social hierarchies of the *ancien régime*. By enforcing

equal inheritances between siblings, the revolutionaries believed to have found one pivotal mechanism to achieve equality.

Historically, most areas of France had apportioned property among sons or simply to the eldest son (Desan 1997, 604). In the quest to achieve “‘equal rights’ and ‘equality before the law’” (King and Smith 2005, 80), inheritance regulation became a center point of the revolutionary debate:

In France, inheritance law also became an important focus of political debate at the time of the Revolution. Particularly, the institutions of primogeniture and entail were rejected as structural elements of the *ancien régime* which were seen as incompatible with the revolutionary principles of freedom, equality, and fraternity. (Beckert 2007, 91–92)

The American revolutionaries, too, believed in the ability of equal inheritances to engender political and social equality. In his classic book *Democracy in America*, Alexis de Tocqueville noted that “the law of inheritance was the last step to equality” (1835, 31). In particular, Tocqueville argued that equal inheritance rights among siblings had leveled the playing field in the United States (Giesey 1977, 271). The Founding Father Thomas Jefferson too, was a fierce opponent of primogeniture, drafting statutes that helped abolish the custom. In his autobiography, Jefferson writes: “The abolition of primogeniture [...] removed the feudal and unnatural distinctions which made one member of every family rich, and all the rest poor” (Jefferson 1984). Louis Hartz, in his influential book *The Liberal Tradition in America*, concludes that “the abolition of quitrents and primogeniture [...] tinged American liberalism with its own peculiar fire” (1955).

In France, commentators argued that fair intrafamily inheritances would generate equality, first and foremost, by attenuating differences across two socially salient strata: women and aristocrats. Unsurprisingly, their aim was to empower the former and to weaken the latter:

In March 1790 the Constituent Assembly began by abolishing primogeniture for formerly noble property, at the same time as it abolished nobility itself. This meant that all the heirs of a property-owner could inherit, including daughters, and not just the eldest son or other male descendant, the previous practice. Two years later, in March 1793, the Convention extended equal inheritance rights to all kinds of property, and moreover this legislation was made retroactive to 1789. So that legally, brothers had to hand back a share of their property

to their sisters; and many women exercised their rights, to the confusion of the courts.
(Rose 1986, 178)

The implementation of equitable inheritance meant that women had the right to inherit. There is no doubt that gender inequalities persisted. But a letter from 1795 underlines the pivotal role of inheritance regulation in spurring gender equality. The *citoyenne* LeFranc of Caen writes: “You have only passed one law beneficial to women, the law 17 *nivôse* [which guarantees equal partitions of inheritance]. If you destroy this law of equality that has converted to the Republic an infinity of women [...] you are unjust” (cited in Desan 1997, 597). Men, by contrast, complained that equitable inheritances had “de-paternalized” France.

In addition to redistributing wealth to women, discussed in greater detail below, equitable inheritances among siblings, notes Traer (1980), empowered women by undermining traditional marriage strategies. Inequitable inheritance customs meant that marriage arrangements were inextricably linked to the partitions of estates (Halpérin 1992; Phillips 1980). Weddings were structured such that families ensured the “consolidation of noble lands” and “a reduction in the claims of kin” (Goody 1983, 120). Peggy Reeves Sanday underlines that such arrangements are a defining feature of many patriarchal societies around the globe: Families exchange women for resources (1981, 205). Equitable inheritances render such transactions futile because every child—male or female—gets a fair share. Desan (1997, 598) writes: “By offering equal inheritance rights to women, the [French] reforms undermined family strategies and called into question traditional assumptions about the status and position of women.”

More broadly, the French reform created new political and legal opportunities for women. The demand for equitable inheritance became “a basic arena of female politicization” (Desan 1997, 599). Protests were particularly widespread in Normandy, where property had historically been shared between sons. Daughters had no claim on property beyond a small dowry. They therefore began to demand what was rightfully theirs: a share of their parents’ property (Landes 1988). The new income proved particularly important for women at a time when growing industrialization threatened to push them further to the economic periphery. As Ruth Schwartz Cowan argues, industrialization was accompanied by an ideology whereby “woman’s place was in the home; man’s was in the world” (1987, 186). Equal inheritances thus became one mechanism through which gendered “economic spheres” could be attenuated.

The “losers” in this process—besides firstborn sons—were aristocrats. The French Revolution, more broadly, was history’s great uprising against the feudal class. Inheritance regulation played a pivotal role. In one heated debate, a revolutionary demanded every citizen’s right to an equal share of inheritance. Such demands were a head-on attack against the noble class; the *citoyen* was well aware of this fact, exclaiming, “We will attack aristocracy even in the tomb and take away its surest means of destroying our liberty,” by which he referred to inheritances (cited in Desan 1997, 601). In America, too, commentators noted that the abolishment of primogeniture brought about “a less aristocratic society and a movement in the direction of more democratic institutions” (Keim 1968, 545).

Equitable inheritance meant that the feudal class was hard pressed to maintain the cohesion of family wealth. After all, notes Hurwich (1993, 699) in a careful historical analysis of the German nobility, “primogeniture or other forms of impartible inheritance was [...] [a] method by which noble families could avoid subdivision of their estates and consolidate wealth to hand on to future generations.” Ekelund, Hébert, and Tollison second that “[primogeniture] concentrated wealth in the hands of a few dynastic families” that “were entrenched within a centralized power system” (2002, 658). By abolishing primogeniture, Tocqueville claimed that the revolutionaries had destroyed “the last trace of ranks and hereditary distinctions” (cited in Giese 1977, 271).

In sum, the historical experiences in France and the United States point to a logic whereby equitable inheritance customs attenuate inequalities in the political and social realm. This holds particularly true for the heretofore structurally disadvantaged group of women. Moreover, equitable inheritances undermine the hereditary classes of higher status, notably, aristocrats. Such families are no longer able to keep their property in one piece, thus decreasing their political and social clout. The main hypothesis of the French revolutionaries may thus be characterized as follows:

H1: Equitable inheritance customs engender gender and class equality in the political and social realm.

Mechanism 1: Wealth Inequality

The most prominent logic linking equitable inheritance to equality pertains to the distribution of wealth. Primogeniture, by apportioning all assets to the eldest son, leaves the remaining children with little or no wealth. Equitable

inheritance, on the other hand, achieves wealth equality by splitting property fairly among all children.

The link from equitable inheritance to a more equal distribution of wealth is a common argument among social scientists. Blinder (1973), for instance, presents a theoretical model and Menchik (1980) delivers empirical evidence demonstrating a firm link between equitable inheritance and a more equal distribution of wealth within families and within society at large. Thus, Menchik concludes: “Economies that feature primogeniture will have a greater degree of inequality than those featuring equal division” (1980, 299).

Discussing primogeniture in Europe, Ekelund, Hébert, and Tollison (2002, 67) write: “Primogeniture encouraged the concentration of wealth.” In a historical analysis of Lombardy, Roberts (1953) notes that its nobility constituted a mere 1% of the population but owned nearly half of its property. The author attributes this inequality in land to one particular institution: primogeniture (1953, 67). Goody (1983)—discussing medieval France, Germany, and Britain—also notes that primogeniture was put in place to consolidate noble lands in the hands of a few. Crucially, this worked in favor of the (Catholic) Church, which had a “strong interest in protecting the integrity of holdings of villeins” (Goody 1983, 119). Frankema (2010) confirms that land inequality, to this day, is strongly predicted by the share of Catholics in a given country (see also Huber et al. 2006).

Taken together, equitable inheritance may thus increase gender and class equality in the social and political realm by fairly apportioning wealth. The causal link from increased wealth equality to social equality, then, is short. A variety of scholars have argued that wealth inequality—particularly in the form of land—stands in the way of free and fair elections (Rueschemeyer, Stephens, and Stephens 1992). For one, notes Ziblatt, the unequal distribution of wealth gives landlords “greater capability to deploy longstanding monopolistic ‘patron-client’ influence in one domain into the electoral arena” (2009, 3). Moreover, landed elites may have a greater incentive to capture local institutions and then subvert the democratic process.¹ Taken together, we would thus expect greater land equality to attenuate social and political inequities. We therefore formulate the following secondary outcome, which possibly mediates the relation between equitable inheritance customs and equality.

H2: Equitable inheritance customs reduce wealth inequality.

¹It must be noted, however, that the link from wealth inequality to a lack of democratization is disputed (for a review, see Scheve and Stasavage 2017).

Mechanism 2: Pro-Egalitarian Preferences

Besides a rather mechanical effect on the distribution of wealth, the French revolutionaries also pointed to habitual effects of equitable inheritances among siblings. Habakkuk (1955, 4), for instance, writes that “inheritance systems exerted an influence on the structure of the family, that is, [...] on the relations of parents to children and between children.”

Such a change in preference was particularly visible with regard to gender equality. In France, new inheritance rights had specifically been designed to make families more equal. The reform was partly a contest over gender dynamics within family and society at large. Equitable inheritance thus aimed at “reimagining the family and its gender dynamics, [...] promot[ing] an egalitarian family based on mutual affection and reciprocity” (Desan 1997, 600–601). In a similar vein, Todd (1994), in his book *La destin des immigrants*, argues that equitable inheritance customs fostered a symmetric family structure in which the equality of siblings is taken for granted. By contrast, inequitable inheritance leads to an asymmetric family structure, which prizes the eldest son. As a result, argues Todd, equitable inheritance customs foster preferences for equality among children. Ekelund, Hébert, and Tollison second that inequitable inheritances caused “untold bitterness within the family” (2002, 658), standing in the way of true equality.

Beckert (2007) buttresses this argument by drawing on evidence from revolutionary France. He demonstrates that equitable inheritance was widely seen as instilling in people a sense of the equality of all citizens. Beckert writes that the “unequal legal treatment of different social ranks and of family members based on ascriptive characteristics was seen as a violation of natural equality” (2007, 92). A debate in the *Assemblée Nationale* in 1791 underlines this logic:

I would not know, Gentlemen, how it should be possible to reconcile the new French constitution, where it heads with regard to the great and admirable principle of equality, with a law that allows a father, a mother, to forget in relation to their children, these sacred principles of natural equality, and to enlarge thereby in society the differences that result from the diversity of talents and from industry, instead of correcting them through the equal division of the household wealth.

(Mirabeau in *Assemblée Nationale*, April 2, 1791, 513; cited in Beckert 2007, 93)

Similar arguments about equitable inheritance's influence on pro-egalitarian preferences are also found in the writings of political philosophers. Hirschmann (2008), for instance, highlights that John Stuart Mill's *On Liberty* singles out inequitable inheritance, particularly primogeniture, as an immoral institution. According to Hirschmann (2008, 204), Mill "opposes primogeniture and claims that parents have a moral obligation to bequeath to their children who are 'unable to provide for themselves.'" The idea is that equitable inheritance customs induce in children an idea to care for others less fortunate.

Importantly, such a shift in societal preferences is at the heart of much theorizing on how to spur gender equality, particularly in the political realm (Dolan 2010). As Brighthouse and Wright (2009, 86) write, "[s]ocial norms continue to differentiate appropriate 'men's work' from 'women's work.'" If equitable inheritances, indeed, spur preferences for egalitarianism, this might help explain why women may benefit from equitable intrafamily inheritance customs. Thus, equitable inheritance—in addition to altering family marriage strategies—may have spurred gender equality by fostering societal norms surrounding fair treatment.

Taken together, equitable inheritance may thus increase gender and class equality in the political and social realm by fostering a belief in the fundamental equality of all humans. The causal link from increased pro-egalitarian preferences to social and political equality, then, is similarly short. The endorsement of democratic values is a key precondition for democracy. And egalitarianism is one such value (Dahl 1973), given that it specifically prizes the equal treatment of human beings. The fact that values and beliefs affect structural outcomes, too, is not a leap (e.g., Burszty, Gonzalez, and Yanagizawa-Drott 2018). Stevens, Bishin, and Barr (2006), for instance, find that authoritarian (i.e., anti-egalitarian) attitudes negatively predict support for democracy. We therefore formulate the following secondary outcome, which possibly mediates the relation between equitable inheritance customs and social equality.

H3: Equitable inheritance customs increase pro-egalitarian preferences.

Data

Independent Variable: Inheritance Customs

To assess the relation between inheritance customs and inequality, we draw on microlevel evidence from Germany. The country exhibits pronounced historical

municipality-level variation in agricultural inheritance customs (see Figure A1 in the supporting information [SI]). Particularly in Germany's southwest, inheritance customs regularly vary from one village to the next.

To our knowledge, the most comprehensive data on German inheritance customs were collected by Helmut Röhm (1957).² Röhm sent a detailed questionnaire to all 24,547 German municipalities. The resulting map is provided in Figure A1 in the SI. The map depicts the historically prevalent agricultural inheritance custom (circa 1800). There are two historic forms: equitable inheritance (property is fairly split among siblings) and inequitable inheritance (property is given to the firstborn son).

In order to convert the map's information into a numeric variable, we proceeded as follows. Since West Germany has continuously reduced the number of municipalities (8,670 as of 2015), we overlaid Röhm's map with Germany's current municipal administrative boundaries. We then used an algorithm that counts the number of pixels associated with a given inheritance custom in the map. Given that the 2015 municipalities tend to be larger than the municipalities of 1957 and given that the algorithm has random measurement error,³ the resulting treatment measure is continuous.

Based on these continuous data, we then proceeded to construct a dichotomous custom indicator, where the custom variable with the highest share of pixels is assigned a 1, and 0 otherwise. The dichotomous measure shows that historic inheritance customs were split between roughly one-third equitable (28%) and two-thirds inequitable (66%), with the remainder being public lands. In the following, we rely on the dichotomous inheritance variable for three reasons. First, it is more easily interpretable. Second, it is less noisy. Third, it affords

²We should point out that agricultural inheritance customs are distinct from inheritance law. Indeed, the first scientific inquiry into German inheritance customs by Max Sering was explicitly designed to "assess in what means and ways inheritance customs diverge from inheritance law" in the Kingdom of Prussia (Röhm 1957, 5). Inheritance customs thus depict the de facto way of inheriting as opposed to the de jure way (for details, see Baumecker 1940). There is detailed historic evidence underlining the stickiness of the customs—even in the face of changing inheritance laws. Röhm, for instance, notes that up until the 1930s, German "agricultural inheritance customs were neither influenced by scholarly doctrines nor by legislative changes" (1957). Frost (1931) takes the view that German inheritance customs have not fundamentally changed, whatsoever: "Institutions as deeply linked to the ethical perceptions and economic necessities, as long standing and intertwined with the lives of peasants as inheritance customs cannot be fundamentally changed—not even by law" (1931, 21; translation by the authors).

³The algorithm counts the number of pixels of a given treatment color in Röhm's map. Thus, areas with imperfect coloring or with city names are not counted appropriately. Such error, however, is minuscule and plausibly random.

local-level geographic matching. But we note that all results presented in this article are robust to using the continuous measure.

Importantly, the historic inheritance customs shown in SI Figure A1 continue to matter to the present day. Moreover, they historically extended and continue to extend well beyond agricultural properties. Although there is a general move toward equitable inheritances—though German law, to this day, does not mandate strict equality (see SI Appendix A.1)—many areas of Germany still see wealth passed on to the eldest son. Contemporary municipality-level evidence, however, is not available. For this reason, we rely on the historic data gathered by Röhm (1957). Our empirical strategy thus estimates the *intent-to-treat* effect, which likely underestimates the true treatment effect.

Still, to buttress that historical agricultural inheritance customs continue to shape inheritance patterns to this day, we rely on two pieces of evidence. First, we conducted qualitative interviews across Germany with a variety of individuals, including bureaucrats in tax authorities, farmers, and regular employees. For the sake of brevity, this evidence is reported in the SI (Appendix A.1; detailed transcripts are available upon request). The interviews demonstrate that, as one farmer stated, “inheritance is still done like we did it 200 years ago.” Perfect equality—particularly in areas with historically inequitable customs—is a distant ideal.

Second, we cooperated with the German tax authority to devise a measure of local-level wealth inequality in order to explore whether unfair inheritance customs continue to predict greater wealth inequality today. Specifically, we used rental income from properties as a proxy for wealth and constructed a municipality-level wealth inequality Gini index. As SI Table A1 shows, there continues to be a significant positive correlation between inequitable inheritance customs and today’s level of wealth inequality.

Dependent Variable: Social Inequality

Our main outcome of interest is the degree to which local German municipalities can be characterized as socially equal. Following Ronald Dworkin, we define equality as a principle, which stipulates “that government must act to make the lives of citizens better, and must act with equal concern for the life of each member” (Dworkin 2003, 116). More specifically, given our empirical setup, we hone in on the distribution of resources within society. We thus analyze equality through the prism of what Abbott calls “equality of result, [which] means the

lessening (across all positions) of positional differences” (2016, 244).

Given our theoretical discussion, we would expect inheritance customs to affect the distribution of resources for two groups in particular: women (as opposed to men) and aristocrats (as opposed to nonaristocrats). The former group marks a historically disadvantaged group, whereas the latter marks a historically favored group. To assess positional differences, we hone in on two salient resources at the core of the revolutionary debate: political representation and social status. We focus on social and political resources because, historically speaking, inheritance reforms were clearly intended to strengthen women’s political clout and to undermine the social status of the noble class.

We measure municipality-level *gender inequality* in two ways (see SI Section A.4.1). First, we measure the share of women in political councils in 2014. Moreover, to examine variation in female political representation over time, we also draw on data from a panel that tracks women serving on municipal councils between 2001 and 2012. By and large, local councils in Germany are filled using open-list proportional representation (Bullock and MacManus 1991; Davidson-Schmich 2016, 33). German councils are thus an excellent laboratory to scrutinize the effect of egalitarian preferences—one hypothesized mediator—on gender representation. Second, we use the share of women in local *Rotary International* chapters, a self-proclaimed club representing the social “elite.”

We measure municipality-level *class inequality* using the share of (a) aristocrats and (b) ancient aristocrats (known in German as *Uradel*; more information can be found in SI Section A.4.2) in Rotary clubs. To corroborate that Rotary clubs capture the social elite, we digitized the jobs of all Rotary members in Germany in 2012, calculated their International Socio-Economic Index of Occupational Status, and compared it to the representative German Socio-Economic Panel (SOEP). As we detail in the SI Appendix A.7, the average Rotary member has higher socioeconomic prestige than 94.4% of all employed SOEP respondents.

Results

To estimate the association between equitable inheritance customs and equality, we proceed in four steps. First, we present basic cross-sectional models. Second, we present models controlling for potential confounders. Third, we report estimates from a microlevel geographic matching design. Fourth, we estimate instrumental variable regressions.

TABLE 1 Equitable Inheritance and Inequality

	Women in Local Political Councils (1)	Women in Rotary Clubs (2)	Aristocrats in Rotary Clubs (3)	Ancient Aristocrats in Rotary Clubs (4)
Equitable Inheritance	0.028 (0.003)	0.037 (0.094)	-0.217 (0.093)	-0.056 (0.094)
N	3,944	600	600	600

Note: The table reports OLS regressions of the indicated inequality measures on the equitable inheritance dummy. Standard errors are given in parentheses. Rotary outcomes (Models 2–4) are standardized to ease interpretation. The council outcome (Model 1) is given in percent.

Cross-Sectional Model

We begin by estimating a simple linear model, regressing the respective equality outcomes on a dummy for equitable inheritance customs. We first turn to gender inequality. In Table 1, we confirm that equitable inheritance is associated with a rise in the share of women in local political councils by 2.8 percentage points (Model 1). The coefficient is precisely estimated and marks a substantively meaningful increase in gender equality. Moreover, women are also 0.04 standard deviations more likely to be represented in Rotary clubs (Model 2).⁴ The latter coefficient, however, is not precisely estimated. In SI Table A3, we reestimate Model 1 using panel evidence on female representation in local councils between 2001 and 2012. Although the data set includes fewer municipalities, the analysis confirms our finding and yields substantively similar estimates.⁵

Next, we turn to class inequality. When regressing the share of aristocrats in Rotary chapters on our treatment indicator (Model 3 in Table 1), we estimate a negative coefficient. Specifically, equitable inheritance is associated with a 0.2 standard deviation reduction in aristocratic members. We confirm this result when focusing on “ancient” aristocrats (*Uradel*). Here, we estimate a reduction by 0.06 standard deviations. This estimate, however, is less precise because there are few aristocrats from the “ancient” aristocracy in our data.⁶

⁴Since the share of women and aristocrats in Rotary chapters is low, we standardize these outcomes.

⁵In SI Table A8, we also report models in which we restrict the sample to municipalities dominated by parties from the conservative spectrum (i.e., the Christian Democratic Union and the Christian Social Union). This addresses the concern that increased female representation may simply be a product of gendered nomination practices by parties. Reassuringly, we confirm a robust correlation between equitable inheritance customs and female representation in municipalities dominated by conservative parties.

⁶In SI Appendix A.5, we also present models that explore the degree to which the two inequality measures are interrelated in more complex ways. Using structural equation modeling, we confirm

Controlling for Confounders

Next, we introduce potential confounders as control variables to the model. Four variables are of particular theoretical interest: land rights, child labor, welfare state expansion, and population density. We discuss each confounder in turn and introduce our data to measure them.

First, gender and class equality may historically have been affected by regulations regarding *land ownership*. If ownership is restricted to upper classes or men, this may explain some of the variation we observe in inequality among women and aristocrats. In the nineteenth century, Germany had seven different legal systems. One well-known example, the French Code Civil, has specifically been linked to the adoption of equitable inheritance customs as well as improved equality—though most historians maintain that the customs date back much longer.⁷ To control for different legal systems regarding land ownership, we therefore digitized the map shown in SI Figure A7 and include dummy variables for the legal codes present in West Germany in our model.

Second, gender and class equality may historically have been affected by the extent to which *child labor* was practiced. Possible effects, however, do not point in the same direction. On one hand, areas where child labor was practiced may have seen a more active engagement of women in the local labor market (cf. Cohen 1987),

that equitable inheritance customs diminish both class and gender inequality. At the same time, we also show that gender equality likely *increases* class equality: Greater female representation is associated with fewer aristocrats in local elite organizations. The argument confirms empirical evidence by Esping-Andersen (2009), who contends that gender inequality increases class inequality.

⁷Two additional variables that may confound the link from inheritance customs to social and political inequality are dowries and family law (Gaulin and Boster 1990). There is some evidence that the Prussian state weighed in on dowries in the early 1700s in order to boost fertility. But the policy was later abandoned (Fuhrmann 2002, 76) and did not create variation at the local level. A similar picture emerges when scrutinizing family law. At least in the nineteenth century, family law was largely “non-interventionist” (Fuhrmann 2002, 85) and did not vary at local levels.

which may have attenuated gender inequality. On the other hand, child labor may have exacerbated class inequality by providing elites with a larger pool of laborers. While we are not aware of any arguments that link child labor to inheritance customs, controlling for child labor may still help us tighten our empirical estimates. To measure child labor, we digitized data on child labor prevalence in the German Empire (see SI Figure A8 and Section A.4.7) and add the variable to the main model.

Third, gender and class equality may historically have been affected by the creation of the German welfare state. A stronger welfare state, conceivably, should have attenuated inequalities by supporting women and lower social classes. Although the welfare state is a macrolevel phenomenon, Germany did see pronounced variation in the degree to which the state became active to support vulnerable groups. To measure welfare state expansion in the nineteenth century, we digitized data from the Yearbook of the German Cities (see SI Section A.4.9). More specifically, we use expenses that benefit the poor from the year 1890 and add them as a control variable to our model.

Fourth, our outcome measuring gender representation in politics—the share of women in local councils—may also be affected by two specific variables that have been found to predict gender representation in Germany: council size and population density. Davidson-Schmich (2016, 93), for instance, finds “a clear correlation between population density and women’s participation in political parties” in German local councils. And Alozie and Manganaro (1993) find that council size positively predicts female representation (see also Bullock and MacManus 1991).⁸ Whereas council size cannot have influenced inheritance customs, population density might have done so, given that equitable inheritance is argued to lower population growth (Bertillon 1911). Notwithstanding, we include both a measure of local council size as well as municipal population density as further control variables in our models.⁹

With these additional control variables (and potential confounders) at hand, we proceed to reestimate the benchmark linear model. We report the results in Table 2. Reassuringly, we continue to see a statistically significant

⁸We note that the electoral system exhibits no variation in our context—despite it being a prominent explanatory variable for female representation in politics (e.g., Trounstein and Valdinì 2008). In a similar vein, we can also not control for alternative explanations for a gender gap in political representation—including gendered perceptions (e.g., Fox and Lawless 2011)—given a lack of local-level data in the German context.

⁹We would, however, like to draw our readers’ attention to the fact that adding posttreatment variables may create posttreatment bias. The estimates presented in Table 2 should thus be interpreted with caution.

association between equitable inheritance customs and female representation in local councils. There is also a weak positive correlation between equitable inheritance and women’s representation in Rotary—though the coefficient is, again, not precisely measured. We also confirm that equitably inheriting communities see a significant reduction in the share of aristocrats in local Rotary chapters. The results thus build trust that the observed correlation is robust. The inclusion of covariates does not change the substantive finding reported in Table 1, despite a slightly reduced sample size.

Matching

In order to more effectively control for unobserved confounders at the local level, we now proceed to introduce a geographic matching design. Specifically, we match a given municipality to the closest municipality with a different historic inheritance custom and conduct paired *t*-tests. To minimize local-level differences, we only permit matches within a radius of 27 kilometers (the detailed procedure is laid out in SI Appendix A.6).

We present the results in Figure 1, which broadly corroborate the cross-sectional estimates. First, we confirm that municipalities that historically fairly distributed wealth among siblings are significantly more likely to elect women into local political councils. Here, female representation is 2 to 3 percentage points higher.

Second, we repeat the matched analysis with the Rotary data. Since the data are skewed, we log-transform the share of women and aristocrats in local chapters.¹⁰ The estimates, presented in Figure 1, confirm that equitable inheritance is associated with about 5% fewer aristocrats in Rotary clubs. The estimate is similar for ancient aristocrats. Our estimate for women in Rotary clubs, however, is low, negative, and imprecise.

To assess the robustness of the matching procedure, in Figure 2, we vary the distance within which matches are permitted. To streamline the analysis and to provide a more robust measurement of social and political inequality, we combine our different measures to a standardized equality index. The figure shows that the matching results are robust to even the smallest potential matching radius (4 kilometers). The analysis thus builds trust in the robustness of the observed association. The coefficients are sizable and precise.

¹⁰In order to afford our microlevel matching, we must infer a given municipality’s share of women and aristocrats in Rotary chapters using the nearest chapter (see SI Appendix A.4). We note, however, that all results are robust to restricting the analysis to the available 600 Rotary chapters (see the subsection “Cross-Sectional Model”).

TABLE 2 Equitable Inheritance and Inequality (Controls Included)

	Women in Local Political Councils (1)	Women in Rotary Clubs (2)	Aristocrats in Rotary Clubs (3)	Ancient Aristocrats in Rotary Clubs (4)
Equitable Inheritance	0.011 (0.004)	0.064 (0.116)	-0.241 (0.128)	-0.079 (0.124)
Child labor	-0.0004 (0.001)	-0.026 (0.028)	0.057 (0.031)	0.071 (0.030)
Welfare expenditure	0.001 (0.002)	0.049 (0.053)	-0.009 (0.059)	0.008 (0.057)
Council size	0.008 (0.003)			
Population density	0.031 (0.002)	0.028 (0.048)	-0.024 (0.053)	-0.049 (0.052)
Total population	0.002 (0.002)	-0.026 (0.020)	0.028 (0.022)	0.050 (0.021)
Code civil	-0.031 (0.008)	0.027 (0.237)	0.287 (0.263)	0.485 (0.256)
Common law	-0.018 (0.007)	-0.222 (0.236)	0.567 (0.261)	0.608 (0.254)
Danish law	-0.019 (0.014)	-0.030 (0.446)	0.313 (0.494)	0.599 (0.480)
Prussian land law	-0.024 (0.008)	0.016 (0.230)	0.129 (0.255)	0.353 (0.248)
N	3,851	475	475	475

Note: The table reports OLS regressions of the indicated inequality measures on the equitable inheritance dummy, including the indicated control variables. The omitted legal code is the *Badisches Landrecht* (see SI Figure A7). Standard errors are in parentheses. Rotary outcomes (Models 2–4) are standardized to ease interpretation. The council outcome (Model 1) is given in percent. The population density, council size, and total population variables are standardized.

Instrumental Variables

In a final step, we use an instrumental variable strategy in order to further probe the relation between inheritance customs and social and political inequality. We consulted the historic literature in order to distill potential determinants of inheritance customs in Western Germany. Historians have proposed three competing theories. We discuss these in turn (a detailed discussion is in SI Appendix A.2), and present our corresponding measurement strategy.

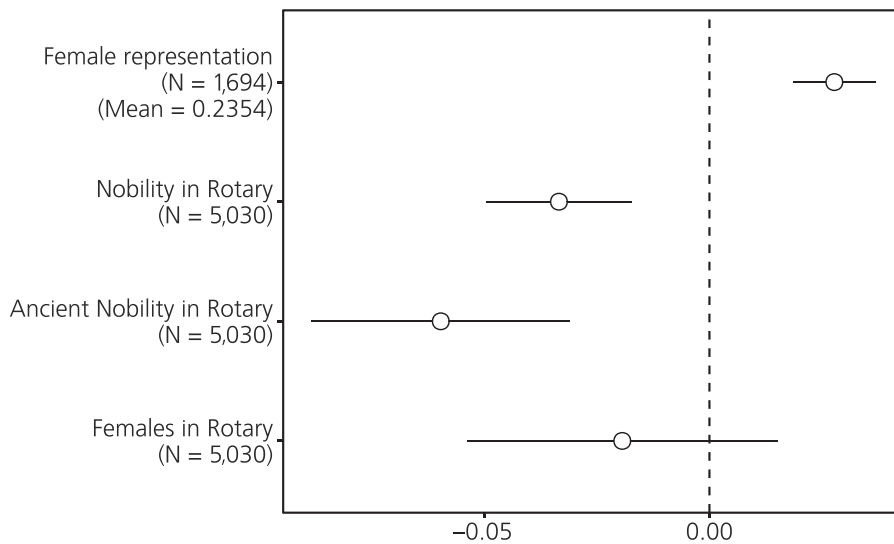
Determinants of Inheritance Customs. First, a *cultural* theory argues that areas in modern-day Germany with greater exposure to the Roman Empire (i.e., areas south of the *Limes*) were more likely to adopt equitable inheritance customs (e.g., Huppertz 1939). To test this theory, we construct a binary Roman rule dummy using data from the Digital Atlas of Roman and Medieval Civilizations (see SI Section A.4.13 for more information). Column 1 in SI Table A11 confirms that Roman rule positively predicts equitable inheritance customs (F-

statistic of 87.0). Roman rule is thus one plausible instrument.

Second, a *political* theory argues that equitable inheritance is more likely in areas where peasants demanded or were granted significant autonomy (e.g., Abel 1956). We proxy peasant liberation using the German peasant wars (1522 and 1525). Specifically, we digitize a map (see SI Figures A5 and A6 and Section A.4.11) to construct a county-level peasant war involvement measure. Column 2 in SI Table A11, however, shows that we cannot confirm that equitable inheritance customs tend to cluster near the historic center of the Peasant wars.

Third, an *economic* theory argues that favorable climate and soil conditions determine whether a given area can afford to adopt equitable inheritance (Schulze 1974). To measure agricultural suitability, we collected data on the mean elevation of municipalities (for more information, see SI Section A.4.12). Column 3 in SI Table A11 confirms that mean elevation negatively predicts the adoption of equitable inheritance (F-statistic

FIGURE 1 Equitable Inheritance and Inequality



Note: The figure plots the difference (dot) between equitably and inequitably inheriting municipalities regarding the two headline inequality outcomes. For all coefficients, the estimates are based on paired t-tests after the geographic matching of municipalities. Female representation is measured in percent, whereas the other three outcomes are standardized. The horizontal lines represent 95% confidence intervals.

of 220.8). Mean elevation is thus a second plausible instrument.

Fourth, and related, the map in SI Figure A1 shows a striking feature in Germany’s southwest. Here, the areas near the rivers Rhine and Neckar are not only highly suitable to agriculture, but also are shaped by equitable inheritance customs. Given that the variation is so clear-cut in this area, we conduct an additional test only within the state of Baden-Württemberg in column 4 of SI Table A11. Specifically, we calculate the distance of a given municipality to the closest river (either the Rhine or the Neckar). The correlation is very strong (F-statistic of 189.5). Distance to rivers in Germany’s southwest is thus a third potential instrument.¹¹

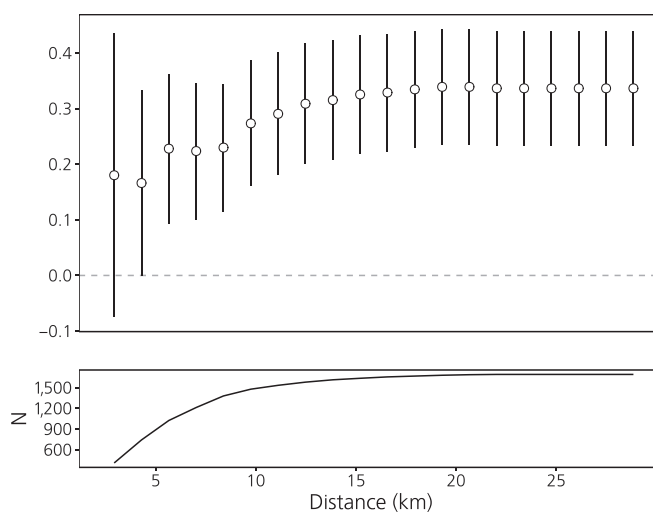
IV results. Next, we proceed to estimate two-stage least squares regressions. Although we have three plausible instruments, there are reasons to be most trusting of the

local-level instrument in Germany’s southwest, namely, distance to the rivers Rhine and Neckar. First, it produces the most precise first stage. Second, it is least likely to violate the core IV assumptions—independence and excludability—given that rivers are exogenous, but no longer should have a strong effect on inequality other than through the treatment. Third, agricultural suitability is the most theoretically intuitive driver of equitable inheritance customs. Last, the design picks up clearly visible geographic discontinuities. Notwithstanding, to underline the robustness of our finding, we report results for all three instruments. And, to further improve our estimation, we include state fixed effects and the aforementioned control variables.

We begin by scrutinizing *gender equality*. In Table 3, we assess female representation in local political councils. The columns report the estimates from three different two-stage least squares regressions. Column 1 uses mean elevation to instrument for equitable inheritance. Using this instrument increases our estimate of female representation considerably, while maintaining a low standard error. Column 2 reports our preferred instrument: distance to rivers within the state of Baden-Württemberg. Although the model has a lower N (866), we estimate that equitable inheritance significantly improves female representation by 5 percentage points. Column 3 uses the

¹¹Note that we instrument the time-varying inheritance customs using nonvarying instruments. In line with Cameron and Trivedi (2005), we can thus only use the instruments to capture *some* of the variation in the time-varying customs (for similar instrumental variable strategies, see Becker and Woessmann 2009 or Nunn and Wantchekon 2011). In our setting, however, the strategy works well: The geographic instruments strongly predict regional differences in inheritance customs, despite the fact that customs have changed over time.

FIGURE 2 Equitable Inheritance and Inequality—Sensitivity



Note: The figure shows the difference (dot) between equitably and inequitably inheriting municipalities regarding inequality. The dependent variable is an equality index, that is, the sum of the standardized female and nobility inequality measures. The results are based on paired t-tests after distance matching (see SI Appendix A.6). The different estimates correspond to different subsamples: For each estimate, the x-axis marks the maximum permitted distance between municipalities in kilometers. The bottom panel shows the number of observations as a function of the maximum permitted distance.

Limes as an instrument. Here, too, we estimate that equitable inheritance—instrumented with Roman rule—is associated with an increase in female representation by 4 percentage points.¹²

In SI Table A9, we report the same empirical models using the share of women in Rotary chapters as our dependent variable. Here, too, we consistently estimate a positive correlation. The models, however, suffer from low statistical power, given that there are only 600 municipalities with Rotary chapters. Taken together, the instruments thus broadly corroborate our finding that equitable inheritance is associated with improved female representation in local political councils as well as in Rotary chapters.

Next, we turn to *class equality*. In Tables 4 and 5, we repeat the same analyses for the share of aristocrats

¹²In SI Table A4, we reestimate the IV specifications using the aforementioned panel data set that tracks female representation between 2001 and 2012. We find the results to be highly similar to what is shown in Table 3, both in terms of magnitude and precision, save for the Roman rule instrument, whose associated coefficient is insignificant and negative.

and ancient aristocrats in Rotary chapters, respectively. Estimates, here, are noisy and inconclusive. While we see consistently negative correlations for ancient aristocrats, the coefficients are inconclusive for the share of all aristocrats. Moreover, standard errors are large for all coefficients, given that statistical power is low. The IV evidence for our class equality outcome is thus mute.

Mechanisms

Having provided tentative correlational evidence in favor of Tocqueville's hypothesis, we now turn to the hypothesized mechanisms: wealth equality and pro-egalitarian preferences.

Wealth Inequality

The most immediate historic mechanism is wealth equality. Both the French and American revolutionaries hypothesized that equitable inheritance spurs gender

TABLE 3 Female representation in political councils (IV)

	Female Representation		
	Mean	Distance to	Roman
	Elevation	Rivers	Rule
	(1)	(2)	(3)
Equitable	0.136	0.051	0.039
Inheritance	(0.026)	(0.023)	(0.038)
Council size	0.016	-0.008	0.015
	(0.003)	(0.009)	(0.003)
Population	0.020	0.018	0.028
density	(0.003)	(0.005)	(0.004)
Controls	Yes	Yes	Yes
State fixed	Yes	No	Yes
effects			
F-statistic	122.19	99.17	46.08
(first stage)			
N	3850	866	3851

Note: The table reports coefficients and standard errors from 2SLS-IV regressions. The dependent variable is the share of women in local political councils. We include state fixed effects, where possible, and control for the size of the council, the total population of the municipality, population density, child labor in 1898, welfare spending in 1890, and the prevailing legal code. The population density and council size variables are standardized.

TABLE 4 Nobility in Rotary Chapters (IV)

	Nobility in Rotary		
	Mean	Distance to	Roman
	Elevation	Rivers	Rule
	(1)	(2)	(3)
Equitable	0.468	0.379	-0.408
Inheritance	(0.556)	(0.365)	(1.103)
Controls	Yes	Yes	Yes
State fixed	Yes	No	Yes
effects			
F-statistic	31.16	13.33	7.63
(first stage)			
N	598	97	598

Note: The table reports coefficients and standard errors from 2SLS-IV regressions. The dependent variable is the standardized nobility presence in Rotary clubs. We include state fixed effects, where possible, and control for longitude, latitude, child labor in 1898, welfare spending in 1890, and the prevailing legal code. The sample is restricted to municipalities with Rotary chapters.

and class equality in the social and political realm by reducing wealth inequality. We measure municipality-level *historic wealth inequality* using the Gini index of

TABLE 5 Ancient Nobility in Rotary Chapters (IV)

	Ancient Nobility in Rotary		
	Mean	Distance to	Roman
	Elevation	Rivers	Rule
	(1)	(2)	(3)
Equitable	-0.173	-0.531	-0.108
Inheritance	(0.490)	(0.524)	(0.968)
Controls	Yes	Yes	Yes
State fixed	Yes	No	Yes
effects			
F-statistic	31.16	13.33	7.63
(first stage)			
N	598	97	598

Note: The table reports coefficients and standard errors from 2SLS-IV regressions. The dependent variable is the standardized *ancient nobility* presence in Rotary clubs. We include state fixed effects, where possible, and control for longitude, latitude, child labor in 1898, welfare spending in 1890, and the prevailing legal code. The sample is restricted to municipalities with Rotary chapters.

agricultural land holdings in 1895 (Ziblatt 2009; see SI Section A.4.4). In Table 6, we provide evidence from a linear model, where we regress inequality in land ownership in 1895 on the equitable treatment dummy (Model 1). The analysis, though it merely includes 196 units (all available Prussian electoral constituencies), showcases that equitably inheriting municipalities are associated with a drop in a land inequality Gini index by 0.09. Although we include controls for welfare spending, child labor, and the legal code, we are unable to estimate fixed effects models or to repeat the geographic matching analysis given the low number of units. The model and data sources are thus limited. But the result provides one piece of evidence that equitable inheritance is, indeed, associated with lower levels of historic wealth inequality.

Pro-Egalitarian Preferences

A second, less immediate downstream outcome, which plausibly reinforces the link from equitable inheritance to equality, is pro-egalitarian preferences. We use two measures for pro-egalitarian preferences.

First, we measure municipality-level pro-egalitarian preferences using the vote share for the Communist party in all elections held during the Weimar period (see SI Section A.4.5 for more information). In Table 7 we report estimates from linear models regressing the vote share for the Communist party in the elections from 1920 to 1933 on the equitable inheritance dummy. The models show

TABLE 6 Equitable Inheritance and Historic Land Inequality

	Wealth (Land) Inequality 1895 (1)
Equitable Inheritance	−0.09 (0.02)
Controls	Yes
N	196

Note: The table reports OLS regressions of the land inequality Gini index on the equitable inheritance dummy. Standard errors are given in parentheses. We control for child labor in 1898, welfare spending in 1890, and the prevailing legal code. The unit of observation is the Prussian electoral constituency.

that equitably inheriting communities are significantly more likely to vote for the Communist party. The result is robust to the inclusion of state and election fixed effects as well as the inclusion of four available control variables: the number of unemployed individuals in 1933, the share of Catholics in 1925, the logarithm of the population in 1925 as well as the share of blue collar workers in 1925 (for details, see SI Sections A.4.5 and A.4.6). Moreover, we also find that equitably inheriting communities are 2.1 percentage points less likely to vote for Hitler's fascist NSDAP party — this outcome, however, is theoretically ambivalent, given that the Nazi party also adopted an anti-conservative rhetoric. Moreover, the effect is imprecise when including the same set of control variables and fixed effects.

TABLE 7 Equitable Inheritance and Historic Voting Behavior

	NSDAP		Communist Party	
	(1)	(2)	(3)	(4)
Equitable Inheritance	−0.021 (0.008)	−0.003 (0.004)	0.018 (0.002)	0.005 (0.001)
Unemployment, 1933		−0.004 (0.003)		0.021 (0.001)
Catholic share, 1925		−0.097 (0.002)		0.002 (0.001)
Log population, 1925		−0.009 (0.003)		0.009 (0.001)
Blue collar share, 1925		−0.026 (0.002)		0.020 (0.001)
State fixed effects	No	Yes	No	Yes
Election fixed effects	No	Yes	No	Yes
N	2,976	2,789	4,651	4,432

Note: Panel regressions of the NSDAP and Communist Party vote share in five (NSDAP) and eight (Communist Party) elections from 1920 to 1933. All covariates except for the logarithm of the total population are standardized. The unit of observation is the county.

Second, we follow Alesina and Fuchs-Schündeln (2007) and use an item from the German SOEP survey in 2002, which asked about the role of the state in providing social security. Answers are recorded on a 5-point Likert scale, ranging from 1 (*only the state is responsible*) to 5 (*only private organizations are responsible*). To ease interpretation, we reversed the scale of the items and standardized them. SI Figure A2 shows a coefficient plot from a regression of the item on equitable inheritance customs, including a host of control variables and state fixed effects. (Note that we cannot conduct a matching or instrumental variable specification due to privacy restrictions imposed by the SOEP.) The figure shows that pro-egalitarian preferences are consistently more pronounced in municipalities that historically adopted equitable inheritance. Estimates range between 0.03 and 0.07 standard deviations. This second piece of evidence thus points to pro-egalitarian preferences as another plausible mechanism that seemingly operates to this day.

Income Inequality

Before concluding, we briefly turn to a final question of interest, namely, whether equitable inheritance customs also ameliorate income inequality. We measure *income inequality* using the municipality-level Gini index of incomes, relying on untapped data from German tax records (see SI Section A.4.3). In SI Figure A4, we use the aforementioned matching design to show that equitable

inheritance is associated with an *increase* in inequality by roughly 1% (Gini) to 6% (log of SD). This marks a substantively meaningful estimate (see SI Appendix A.3 for robustness tests). The finding thus underlines the complex intersection of different conceptions of inequality. Income inequality, after all, is distinct from social or political inequality. Indeed, if equitable inheritance leaves but one inequality, namely, ability, it may well have a positive effect on income inequality.

Discussion

This article has shown that equitable inheritance customs positively predict gender and class equality in the social and political realm. The fact that historic inheritance customs continue to predict contemporary equality is remarkable. After all, Germany is known for its comprehensive welfare state, dating back over 100 years. But the welfare state has seemingly been unable to level differences that stem from unequal inheritance practices. Indeed, in SI Table A10, we show that the historic welfare state, if anything, *decreased* the equalizing effect of equitable inheritance customs, whereas current welfare spending seems to neither exacerbate nor diminish the influence of equitable inheritance customs. Our finding thus echoes arguments by Esping-Anderson who has convincingly shown that the German welfare state upholds traditional gender roles in addition to grading benefits based on occupation and status. He writes: “[a]uthoritarian paternalist conservatism has been historically important in the development of welfare-state structures [...] [whose] guiding principles are hierarchy, authority, and direct subordination of the individual (or family) to the patriarch or state” (1990, 95).

While equitable inheritance customs level the social and political playing field, we also showed them to positively predict income inequality. This finding may strike the reader as counterintuitive. But if status becomes less important, society may shift its focus on talent. This, in turn, may then explain the observed increase in incomes and income inequality. If resources are no longer concentrated within clearly defined social strata, it gives rise to an “equalitarianism whose only inequalities are those of ability” (de Visme Williamson 1976, 102). Social equality may thus, rather perplexingly, give rise to increased income inequality. Although the nature of this interplay was beyond the scope of our study, we believe the finding underlines the multidimensional nature of inequality (Abbott 2016; Crenshaw 1991), which is a promising area for future research.

Our article also pointed out a novel determinant for pro-egalitarian preferences, and, by extrapolation, redistribution. Broadly speaking, we know little about the determinants of preferences for redistribution. This holds particularly true with regard to the impact of long-established customs. How inheritance customs shape pro-egalitarian preferences is thus a second promising pathway for future research. One hypothesis, cited above, is that equitable inheritance customs instill in people a belief that (gender) equality is desirable. At the same time, however, inequitable inheritance customs could also foster a desire to make society more equal because siblings witness unfair treatment within their own family. Future studies could help parse out with greater clarity how inheritance customs affect preferences for equality, for instance, by using survey experiments that expose individuals to different scenarios of inheritance.

Finally, the findings presented in this article may add to a policy debate about inheritance laws. Whereas Western countries have, by and large, put equitable inheritance laws into place, the picture is different in much of the developing world. The *Ethnographic Atlas* (Murdock 1967) shows that out of 583 societies for which data on the distribution of inheritances are available, 282 are characterized as unequal (247 of which implement primogeniture). If our empirical findings are taken at face value, inheritance laws may thus present one lever to engender social and political equality. But it should not be forgotten that de jure inheritance laws do not necessarily match de facto inheritance customs. In Germany, differences between men and women have largely been attenuated (Szydlik and Schupp 2004). However, systematic evidence from other countries is currently unavailable (Edlund and Kopczuk 2009), which marks yet another promising avenue for future research.

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Supporting Information

Additional supporting information may be found online in the Supporting Information section at the end of the article.

Appendix A.1: Qualitative Interviews

Appendix A.2: Determinants of Inheritance Customs

Appendix A.3: Income and Income Inequality

Appendix A.4: Data Sources

Appendix A.5: Structural Equation Models

Appendix A.6: Matching Procedure

Appendix A.7: Socio-economic Composition of Rotary Clubs