
**Patriarchy and Familism in Time and Space:
the comparative study of co-residence across Eurasia**

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I came to Halle in 2013 from the Max Planck Institute for Demographic Research (MPIDR) in Rostock on the premise that my pursuit of the comparative historical regional demography of Europe and beyond would enrich the department's major agenda of exploring Eurasian unity and variation. One of two crucial assets that I brought with me was my *in statu nascendi* Habilitation monograph. The project was started in Rostock, but it was completed, formally defended with a *veniam legendi* and, finally, published in 2015 during my stay in Halle. "Rethinking East Central Europe: Family Systems and Co-residence in the Polish-Lithuanian Commonwealth" (Szołtysek 2015a)¹ reexamines, with the help of a substantial database, the way in which the family-research pioneers formulated European regional pattern differences, how they and later scholars used the proposed regionalization models, and how the initial formulations now appear in light of this project's findings from household listings and other archival population sources from eighteenth century Poland, Lithuania, Belarus and Ukraine. The gravamen of this massive project was that, at the turn of the nineteenth century, there was no such single territory as "eastern Europe". The general view of the European continent that was being consolidated as empirical research on European families unfolded during the 1970s was already on the wrong track with paradigms that used terms such as "dual Europe," employed the "dividing line" metaphor, and speculated about the existence of an "undifferentiated Slavic eastern Europe".

My second asset was the Mosaic Project, which I built jointly with colleagues at the MPIDR in Rostock for the purpose of recovering and analyzing surviving census and census-like records from historic western Eurasia and beyond.² Since its beginning in 2011, the project has established itself as one of the most important players in the ongoing Big Data revolution in historical demography. It currently covers 123 regions of western Eurasia with almost a million individual records spanning the 15th to the early 20th centuries which can be used to develop a wide range of comparable demographic indicators. The project has been successfully communicated to the research community through publications (e.g. Szołtysek and Gruber 2016) and conference presentations (e.g., at the "Big Questions, Big Data" workshop held at the International Institute for Social History in Amsterdam, in 2015).

¹ References to my own publications are listed at the end of this Report.

² Western Eurasia refers here to the European continent as commonly defined.

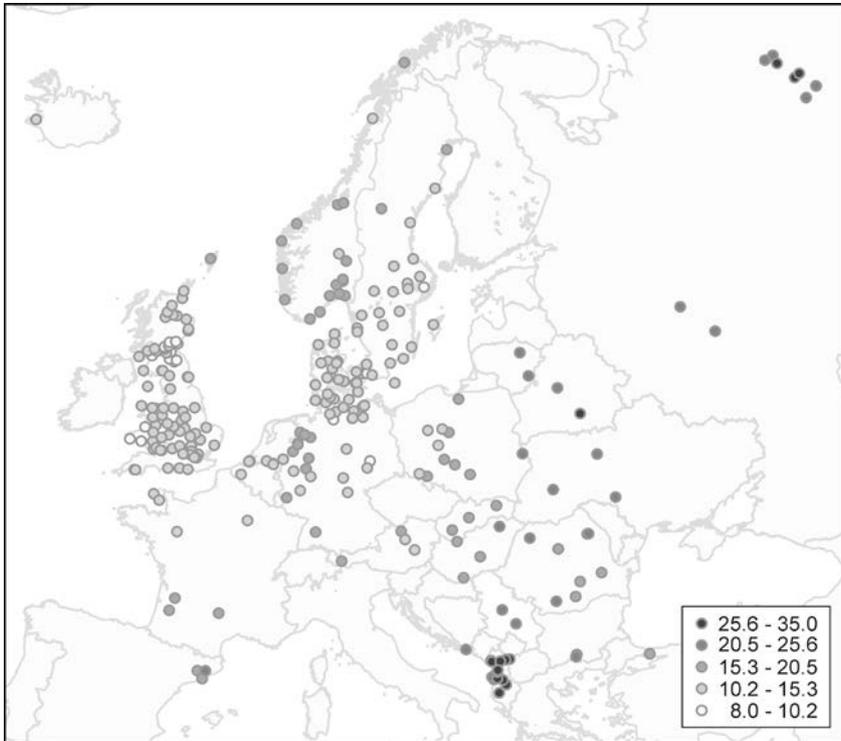


Figure 1: The spatial distribution of the Patriarchy Index (Mosaic/NAPP combined).

(Source: Mosaic/NAPP. Map design: Sebastian Kluesener)

Note. The map is based on a standard deviation categorization centered on the mean of 15.3.

59 percent of data after 1850, 41 percent before 1850.

NAPP = North Atlantic Population Project. www.nappdata.org

(Mosaic: see www.censusmosaic.org)

Further research expanded towards the central and eastern parts of Eurasia would be necessary to address questions as to whether it is possible to brand macro-regions of the landmass as having a particular type of family system; and whether there was a familial “boundary” separating eastern from the western parts within this macro-region. In practice, for a number of reasons, I was unable to implement the ambitious agenda I originally formulated, which included China (Szołtysek 2014b). Instead my comparative agenda focused on western Eurasia, i.e. on the currently available data (or data obtainable at a low cost). In particular, I continued exploring the composite measure of family variation called the Patriarchy Index (PI) (Gruber and Szołtysek 2016). The 2015-2016 years witnessed a substantial enhancement of its analytic potential, enabling its interpretation in terms of varying degrees of sex- and age-related social inequality across different family settings (Gruber and Szołtysek 2016).

Further research on patriarchy (in collaboration with Siegfried Gruber, and more recently with Radosław Poniak, Poland, and Sebastian Kluesener, MPIDR) has garnered considerable attention from leading scholars in various disciplines - economic history (e.g. Joerg Baten), sociology (Göran Therborn), and lately from the Director of Research at the World Values Survey Association, Christian Welzel, with whom further cooperation developed during 2017.

In order to apply the Index to the widest possible historical datasets, Mosaic was linked to the North Atlantic Population Project (NAPP), which allowed adding Great Britain and the whole of Scandinavia to the existing data hub.³ All these data were combined into one dataset with a full overlap in the set of variables, altogether for 274 regional populations from the Atlantic coast of Eurasia to the Urals, comprising 14 million individuals living in 3.3 million family households, in the years 1700-1918 (Figure 1 above). The combined database has been further enriched by historical and contemporary contextual information gathered from multiple sources. Using Geographic Information System tools, rich geo-covariates were linked with Mosaic/NAPP samples, including localized information about land use (the share of cropland/grazing/pasture in 1800), terrain ruggedness, soil quality (suitability for agriculture), as well as data for population density and population potential. Furthermore, information on rules of descent (i.e., how kin were reckoned) was derived by matching a composite variable provided in Murdock's *Ethnographic Atlas* with information provided in other ethnographic syntheses to Mosaic/NAPP populations.⁴

Along with these technical refinements, I have expanded my research conceptually. First, I have put forward a broad conceptual framework to explain family system variations across Eurasia, and specifically patriarchy (Szołtysek 2014a, b). Variations are seen as stemming from the combined effect of (1) demographic constraints; (2) structural-functional, ecological, or institutional (coercive) adaptations, (3) inheritance patterns and kinship organization, and (4) other residual factors (e.g. religion, language, or ethnicity). I have laid out how various elements of this open-ended framework could be operationalized in future research to organize empirical evidence on family and household systems in the wide variety of regional patterns across Eurasia.

Simultaneously, I delved into the problematic of how the exploration of the variation in family patterns in western Eurasia might be conducive to better understanding of inter-regional inequalities, past and present. The major intellectual premise in this regard was the argument that family may represent the grassroots of economic development, as an example of a key informal institution, affecting how societies develop over time. The hypothesis that family

³ 100-percent-samples have been obtained for Iceland, Denmark, Sweden and Norway, and a 10-percent-sample for England (mostly 19th century).

⁴ Todd, Emmanuel. 2011. *L'origine des systèmes familiaux*. Paris: Gallimard.

systems can have an impact on wider societal outcomes represents a reversal of the more usual argument, which posits that economic development produces changes in dominant family patterns. Max Weber alluded to this when he argued that strong family values do not allow for the development of individual forms of entrepreneurship fundamental to the formation of capitalist societies.⁵ More recently, Alberto Alesina and Paola Giuliano have been using a measure of “family ties” derived from the World Values Surveys (1981-2010) to show that strong family ties are correlated with particular societal, economic and political outcomes.⁶ If confirmed through empirical historical research, the family-inequality nexus would suggest that many institutional barriers to social policies may be related to inherited family structures, i.e. to persistent cultural differences stemming from the way in which divergent family forms have shaped elementary interpersonal relations.

To take stock and better promote an acceleration of interest in various neighbouring disciplines in the long-term historical development and implications of human family organization, together with Patrick Heady (MPI Halle) in 2015 I organized an international workshop in Halle, “Murdock and Goody Re-visited: (Pre)history and evolution of Eurasian and African family systems”. Five disciplines were represented: historical demography, social anthropology, evolutionary anthropology, archaeology, and cross-cultural research. The workshop resulted in two special issues of the journal *Cross-Cultural Research* (Heady and Szołtysek 2017).⁷

For this meeting, I used the Mosaic/NAPP dataset to show how 274 historical populations scored on the patriarchy scale. This is the first comparative research on historical patriarchy across such a diverse set of societies in western Eurasia, and the first that reach as far as to the Urals (see Figure 1 above). PI values in western Eurasia ranged strikingly, from 8 to 35 points. While all the regional populations had at least some patriarchal features, as defined above, none could be characterized as fully patriarchal (maximum PI: 40 points). At the most general level, the ranking of the regions is broadly consistent with previous findings from the sociological literature, and seems to confirm the well-known east-west pattern, whereby the westernmost parts of Eurasia appear to be much less patriarchal than other territories.

This generalization is, however, subject to major qualifications. While it is indeed the case that the areas around the North Sea Basin had relatively low patriarchy levels, similarly low levels were also found in parts of Germany

⁵ Weber, Max. 1904. *The Protestant ethic and the spirit of capitalism*. Scribner's Press, New York.

⁶ Alesina, Alberto & Giuliano, Paola. 2014. Family ties. In: *Handbook of economic growth*, volume 2, chapter 4, pages 177–215. Elsevier.

⁷ Jack Goody. 1976. *Production and reproduction: a comparative study of the domestic domain*. Cambridge: Cambridge University Press, 18. See also Goody. 1990. *The oriental, the ancient and the primitive. systems of marriage and the family in the preindustrial societies of Eurasia*. Cambridge: Cambridge University Press.

and areas of Scandinavia near the Baltic Sea. Especially in the cities of today's eastern Germany, the levels of patriarchy appear to have been low. In fact, patriarchy levels were low in regions spread across a vast area of western Eurasia, ranging from Iceland and Great Britain, through northern France, the Low Countries, and parts of Germany and Scandinavia, into Poland and Austria. Equally interesting is the long spread of medium patriarchy levels linking Catalonia and southwestern France with various culturally and geographically disparate areas of Westphalia and Tyrol, and with a long vertical axis stretching from Lithuania to Wallachia (Romania) in southeastern Europe. Areas with elevated PI values also existed in northwestern Europe, such as in the "Bible Belt" of southwestern part of Norway, in northwestern Germany, and on the Shetland Islands. Finally, the real "hot spots" with the highest patriarchy levels were dispersed over a large and discontinuous territory, including modern-day southern Belarus, southern Romania, the central Urals, and Albania. The territories between the Baltic, the Adriatic, and the Black Sea seem to have been particularly diverse, encompassing areas with low levels of patriarchy (like the western and northern parts of historical Poland) as well as areas with moderate to high levels of patriarchy (like many parts of Hungary, Slovakia, and Romania).

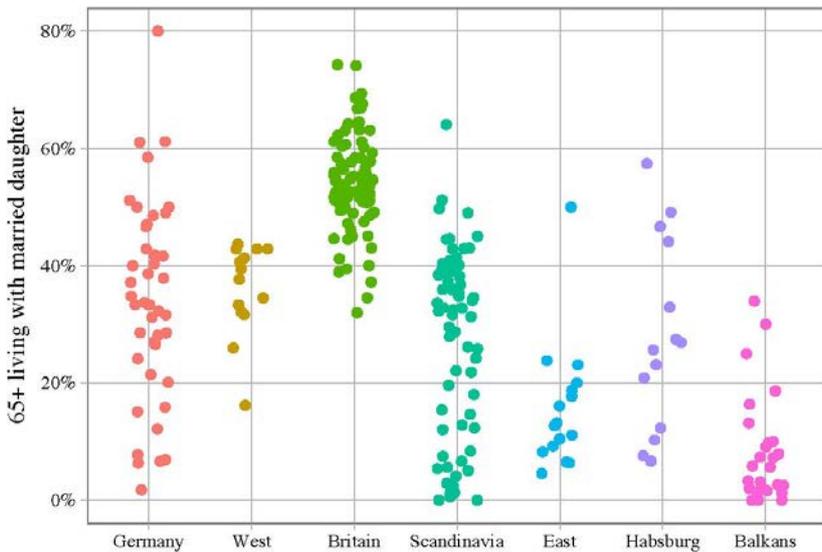


Figure 2: The extent of epiclerate in western Eurasia by major macro-regions.
Data source as in Figure 1

This internal variation within the complex societies of western Eurasia can be better envisioned by looking at one of the Index's components, the proportion of people aged 65+ years living with at least one married daughter in the same household (among those elderly people who live with at least one married child in the same households) (Figure 2). This variable, capturing what Jack Goody referred to as the epiclerate (the institution of "inheriting daughter"), is the best proxy for the "woman's property complex" (or "diverging devolution") considered by Goody foundational to the plough-based agricultural societies of Eurasia.⁸

Figure 2 basically shows that, although the preference in inheritance given to close women before more distant males varies in intensity across the landmass, it was nowhere completely absent, not even among otherwise highly patriarchal and patrilocal societies (as in the Balkans). What this variation would amount to if put in the wider Eurasian context, and whether or not some "patriarchal" commonalities across the landmass would emerge from that comparison, must be left for future meticulous investigation. However, following in the footsteps of Goody's perceptive critique of an undifferentiated "other",⁹ we should expect to find as much regional variation in marriage and family organisation in China, Japan, or Central Asia and Siberia as in Europe. We may also reasonably expect that the two major types of family systems identified in that area – the partlineal/patriarchal joint- and stem-family systems of East Asia and the northern tier of South Asia, and the bilateral, more egalitarian and conjugally oriented systems found in South-East Asia and the southern tier of South Asia, will have a similar bearing on patriarchy to what we find in the west, thus uniting western and eastern parts of the landmass in both difference and similarities.

Based on the results of my patriarchy research, I have put forward another agenda which mobilizes the patriarchy data by linking them explicitly to economic history debates about developmental disparities in western Eurasia. In particular, I have focused on the channels through which family variation can produce developmental disparities by inspecting the relationships between family-generated inequalities as captured by the Patriarchy Index and divergences in human capital formation in the past. In order to approximate historical human capital levels, I followed an established practice of relying on techniques developed around the phenomenon of age-heaping. Baten and his collaborators have long argued that the tendency of people to round off their ages to a number ending with a five or a zero can serve as a proxy for the degree to

⁸ Jack Goody. 1976. *Production and reproduction: a comparative study of the domestic domain*. Cambridge: Cambridge University Press, 18. See also Goody. 1990. *The oriental, the ancient and the primitive. systems of marriage and the family in the preindustrial societies of Eurasia*. Cambridge: Cambridge University Press.

⁹ Jack Goody. *The oriental, the ancient and the primitive*, ch. 4; see also Goody. 1996. Comparing family systems in Europe and Asia. Are there different sets of rules?, *Population and Development Review*, 22 (1), 1–20.

which people could count and calculate (*basic numeracy*), and can be treated as a measure of human capital in historic periods.¹⁰ The Mosaic database allowed scrutinising the numeracy patterns of 500,000 men and women, between 1680-1918.¹¹

In a series of conference contributions from 2016 (leading to publication of the final results in 2017) I have established a strong negative association between the PI and regional numeracy patterns across the Mosaic populations that remains significant even after controlling for a broad range of other important factors, such as the variation in socioeconomic, institutional, and environmental conditions across the societies covered by our data. This outcome suggests that the greater the “patriarchal bias” in the patterning of family organisation at the regional level in western Eurasia, the lower were the respective levels of numeracy – and, hence, the levels of human capital. The observation that family-driven age- and gender-related inequalities, as captured by the index, are relevant for understanding variation in basic numeracy patterns in the past suggests that there are indeed important links between family organisation and human capital accumulation that merit further investigation, and extension to other Eurasian populations in the future.

In yet another approach to patriarchy I have engaged with a flourishing strand of research that argues that a large number of contemporary structural features of societies may have historical roots and that the broad “cultural heritage” of a society leaves an imprint on values that endures through time. Starting from these premises, I have explored the extent to which variation in the combination of various historical family-related institutions and societal mechanisms that the PI captures can be related to present-day spatial variation in the indicators of gender inequality and divergences in value orientations across western Eurasia. The correlations between the historical variety in PI levels and today’s spatial variation in gender and value disparities were made by referring to well-established measures from inequality research.¹² In addition, two indexes based on the World Value Survey data were also checked for their relationship with historical patriarchy, namely Alesina’s measure of

¹⁰ Tollnek, Franziska, Baten, Joerg. 2016. Age-heaping-based human capital estimates. In Claude Diebolt, Michael Hauptert (Eds.), *Handbook of cliometrics* (Springer), p. 1-20 (DOI 10.1007/978-3-642-40406-1_24). Numeracy is the basic competency of quantitative reasoning; namely, the ability to count, to keep records of one’s counting, and to make calculations. Some scholars have claimed that evidence regarding age-heaping not only provides an additional indicator of human capital, but that given the strong correlations observed between age-heaping and literacy, it has the potential to extend our knowledge of human capital *as such* to times and places for which data on literacy are entirely absent or extremely scarce.

¹¹ Including NAPP in this agenda is a task for the future.

¹² See, for example, Dilli, Selin, Rijpma, Auke, & Carmichael, Sarah. 2015. Achieving gender equality: development versus historical legacies. *CESifo Economic Studies*, 61, 301–334.

the strength of ‘family ties’, and Welzel’s “Emancipative Values Index” (EVI).¹³

A comparison of the contemporary indicators with the historical PI values should be interpreted with caution, as the PI data for contemporary states are not representative in a strict statistical sense. Nevertheless, the findings suggest that there are rather strong relationships between historical patriarchy levels and contemporary inequality levels. Of course, the mere establishment of such associations does not allow us to posit the existence of direct causal links between the past and the present. If historical patriarchy levels influenced contemporary gender and value disparities, they probably did so in a path-dependent manner. Nevertheless, these findings provide provisional support for the argument that variation in the characteristics of historical family organization can be relevant to understanding contemporary spatial disparities in the contours of gender inequalities and disparities in value orientations, at least as far as western Eurasia is concerned.

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¹³ Welzel, Christian. 2013. *Freedom rising: human empowerment and the quest for emancipation*. Cambridge: Cambridge University Press. The EVI is a 12-item index measuring Protectivevs.-Emancipative Values”, i.e. a national culture’s emphasis on universal freedoms in the domains of (1) reproductive choice (acceptance of divorce, abortion, homosexuality), (2) gender equality (support of women’s equal access to education, jobs and power), (3) people’s voice (priorities for freedom of speech and people’s say in national, local and job affairs), and (4) personal autonomy (independence, imagination and non-obedience as desired child qualities).

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