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- Author 1: Anselm Hager. University of Konstanz, Graduate School of Decision Sciences and Department of Politics and Public Administration, 78457 Konstanz, Germany. Email: [aanselm.hager@uni-konstanz.de](mailto:aanselm.hager@uni-konstanz.de).
- Author 2: Hanno Hilbig. Harvard University, Department of Government, 1737 Cambridge St, Cambridge, MA 02138, U.S.A. Email: [hhilbig@g.harvard.edu](mailto:hhilbig@g.harvard.edu).

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Anselm Hager is Assistant Professor of Political Economy at the Graduate School of Decision Sciences at the University of Konstanz. Hanno Hilbig is a Ph.D. student in Government at Harvard University. The authors are grateful to Macartan Humphreys, Carles Boix, Isabela Mares, Donald Green, Kimuli Kasara, Felix Elwert, Torben Iversen, Pia Raffler, Dan Ziblatt, Yuhua Wang, Anna Wilke, Christina Zuber, Tim Frye, Christian Breunig, Tara Slough, Justin Valasek, Pierre-Christian Fink, Egor Lazarev, Kilian Huber, Stephan Maurer, Shom Mazumder, seminar participants at Harvard University, Columbia University, the Annual Meeting of the American Political Science Association 2017, The 2018 Barcelona Politics and History Conference, the Social Science Center Berlin and Konstanz University, for help and feedback during different stages of the project. Please send correspondence to Anselm Hager at [aanselm.hager@uni-konstanz.de](mailto:aanselm.hager@uni-konstanz.de).

# Do Inheritance Customs Affect Political and Social Inequality?

## 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 inheritance levels the playing field by rewarding talent, not status.

**Replication Materials:** The data, code, and any additional materials required to replicate all analyses in this article are available on the American Journal of Political Science Dataverse within the Harvard Dataverse Network, at: <https://doi.org/10.7910/DVN/ZUH3UG>

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Why are some societies more unequal than others? One salient determinant of inequality, put forth by the French and American revolutionaries, are 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 paper 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. In particular, municipalities that historically fairly apportioned wealth among siblings elect more women into local political councils and have fewer aristocrats in local elite clubs (Rotary). 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.

In a second step, we explore two mechanisms that help explain this finding. Specifically, Tocqueville and other revolutionaries argued that equitable inheritance customs engender social and political equality i) by fairly apportioning wealth, and ii) 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 with *greater* income inequality. We interpret this finding to mean that equitable inheritance fosters political and social, but not economic equality. It thus achieved what the American revolutionaries had intended: an “equalitarianism [...] among pioneers, [whose] only inequalities were those of ability” (de Visme Williamson, 1976, 102).

The outcomes discussed in this paper connect to several debates in political science. First, the paper draws attention to inheritance customs as a pivotal institution that shapes societal outcomes. While 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 paper 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 (e.g., Boix, 2010; Piketty, 2014). Third, we present a new explanation for variation in representation of women in political offices (e.g., Lawless and Fox, 2010; Davidson-Schmich, 2016; Gilardi, 2015; Kostadinova, 2007). Last, our paper connects inheritance customs to pro-egalitarian preferences and, by extrapolation, preferences for redistribution (Alesina and La Ferrara, 2005; Scheve, Stasavage et al., 2006).

# 1 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 uncovered 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 achieve political and social equality. In his classic book *Democracy in America*, Alexis de Tocqueville wrote 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 (Giese, 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, 2018). Indeed, Louis Hartz, in his influential book *The Liberal Tradition*

*dition in America*, concludes that “the abolition of quitrents and primogeniture [...] tinged American liberalism with its own peculiar fire” (1955, 61).

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 inheritance had “de-paternalized” France.

In addition to re-distributing wealth to women, discussed in greater detail below, Traer (1980) notes that equitable inheritances among siblings empowered women by undermining traditional marriage strategies. Inequitable inheritance customs meant that marriage arrange-

ments were inextricably linked to the partitions of estates (Phillips, 1980; Halperin, 1992). Weddings were structured such that families ensured the “consolidation of noble lands” and “a reduction in the claims of kin” (Goody, 1983, 120). More broadly, 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: “[b]y 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 where growing industrialization threatened to push them further to the economic periphery. As Ruth Schwartz Cowan argues, industrialization was accompanied by an ideology whereby “[w]oman’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 note that the abolishment of primogeniture brought about “a less aristocratic society and a movement in the direction of more democratic institution” (Keim, 1968, 545)

Above all, equitable inheritance meant that the feudal class was hard pressed to maintain the cohesion of family wealth. After all, notes Hurwicz (1993, 699) in a careful historical analysis of the German nobility, “primogeniture or other forms of imitable 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,” which “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 U.S. 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:

- Hypothesis 1: Equitable inheritance engenders gender and class equality in the political and social realm

## 1.1 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 also 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).

Similarly, discussing primogeniture in Europe more broadly, Ekelund, Hébert and Tolison (2002, 67) write: “primogeniture encouraged the concentration of wealth”. And, in a historical analysis of Lombardy, Roberts (1953) notes that its nobility constituted a mere 1 percent 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 who had a “strong interest in protecting the integrity of holdings of villeins” (Goody, 1983, 119). And, indeed, 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 et al., 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.<sup>1</sup> 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.

- Hypothesis 2: Equitable inheritance customs reduce wealth inequality

## 1.2 Mechanism 2: Pro-egalitarian preferences

Besides a rather mechanical effect on the distribution of wealth, the revolutionaries also pointed to habitual effects of equitable inheritances among siblings. Habakkuk (1955, 4), for instances, 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 immigrés*, argues that equitable inheritance customs fostered a symmetric family structure where 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, says Todd (1994), 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

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<sup>1</sup>It 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).

the way of true equality.

Beckert (2007) buttresses this argument 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: 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))

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), 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, here, 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 Brighouse and Wright (2009, 86) write “social 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 and lowering birth rates—may have spurred gender egalitarianism 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 favors the equal treatment of human beings. The fact that values and beliefs affect structural outcomes, too, is not a leap (e.g., Bursztyn, 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.

- Hypothesis 3: Equitable inheritance customs increase pro-egalitarian preferences

## 2 Data

### 2.1 Independent variable: inheritance customs

To assess the relation between inheritance customs and inequality, we draw on micro-level evidence from Germany. The country exhibits pronounced historical municipality-level variation in agricultural inheritance customs (see Figure A1). 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 was

collected by Helmut Röhm (1957).<sup>2</sup> 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,<sup>3</sup> the resulting treatment measure is continuous.

Based on this 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 a 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

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<sup>2</sup>We should point out that agricultural inheritance customs are distinct from inheritance law. Indeed, the first scientific inquiry into 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). Indeed, there is detailed historic evidence underlining the stickiness of the customs—even in the face of changing inheritance laws. Röhm, for instances, notes that up until the 1930s German “agricultural inheritance customs were neither influenced by scholarly doctrines nor by legislative changes” (1957, 2). Forst (1921) 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.” (1921, 21).

<sup>3</sup>The 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.

three reasons. First, it is more easily interpretable. Second, it is less noisy. Third, it affords a local-level geographic matching. But, we note that all results presented in this paper are robust to using the continuous measure.

Importantly, the historic inheritance customs shown in Figure A1 continue to matter to the present day. Moreover, they historically extended and continue to extend well beyond agricultural properties. While there is a general move toward equitable inheritances—though German law, to this day, does not mandate strict equality (see Section 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. 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 (Section A.1; detailed transcripts are available on 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 test 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 Table A1 shows, there continues to be a significant positive correlation between inequitable inheritance customs and today’s level of wealth inequality.

## 2.2 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 “[e]quality 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 non-aristocrats). The former group marks a historically disadvantaged group, while 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 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 (Davidson-Schmich 2016, 33; Bullock III and MacManus 1991). 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 (i) aristocrats and

(ii) ancient aristocrats (known in German as “*Uradel*”; more information can be found in 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 Section A.7, the average Rotary member has a higher socio-economic prestige than 94.4% of all employed SOEP respondents.

## 3 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 micro-level geographic matching design. Fourth, we estimate instrumental variable regressions.

### 3.1 Cross-sectional model

We begin by estimating a simple linear model, regressing the respective political equality outcomes on a dummy for equal 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).<sup>4</sup> The latter coefficient, however, is not precisely estimated. In Table A3, we re-estimate Model 1 using panel evidence on female representation in local councils between 2001 and 2012. While the data set includes fewer municipalities, the analysis confirms our

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

finding and yields substantively similar estimates.<sup>5</sup>

[Table 1 about here]

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.<sup>6</sup>

### 3.2 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 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 19th

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<sup>5</sup>In Table A8, we also report models where 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.

<sup>6</sup>In the SI Section 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 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.

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.<sup>7</sup> To control for different legal systems regarding land ownership, we therefore digitized the map shown in Figure A7 and include dummy variables for the legal codes present in West Germany into 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 into 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 (cp., Cohen 1987), 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 Figure A8 and Section A.4.7) and add it 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. While the welfare state is a macro-level 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 19th century, we digitized data from the Yearbook of the German Cities (see Section A.4.9).

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<sup>7</sup>Two alternative variables that may confound the link form 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 19th century, family law was largely “non-interventionist” (Fuhrmann, 2002, 85) and did not vary at local levels.

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 be 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 Mangano (1993) find that council size positively predicts female representation (see also, Bullock III and MacManus, 1991).<sup>8</sup> While 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 into our models.<sup>9</sup>

[Table 2 about here]

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

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<sup>8</sup>We 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., Trounstine and Valdini, 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.

<sup>9</sup>We would, however, like to draw our reader’s attention to the fact that adding post-treatment variables may create post-treatment bias. The estimates presented in Table 2 should thus be interpreted with caution.

is, again, not precisely measured. We also confirm that equitable 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.

### 3.3 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 Section 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 two to three percentage points higher.

Second, we repeat the matched analysis with the Rotary data. Since the data is skewed, we log-transform the share of women and aristocrats in local chapters.<sup>10</sup> 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.

[Figure 1 about here]

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<sup>10</sup>In order to afford our micro-level matching, we must infer a given municipality's share of women and aristocrats in Rotary chapters using the nearest chapter (see Section A.4). We note, however, that all results are robust to restricting the analysis to the available 600 Rotary chapters (see Section 3.1).

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 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.

[Figure 2 about here]

## 3.4 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. To do so, we consulted the historic literature in order to scrutinize the determinants of inheritance customs in Western Germany. Historians have proposed three competing theories. We discuss these in turn (a detailed discussion is in Section A.2), and present our corresponding measurement strategy.

### 3.4.1 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 Section A.4.13 for more information). Column 1 in 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 Figures A5, A6 and Section A.4.11) to construct a county-level peasant war involvement measure. Column 2 in Table A11, however, shows that we cannot confirm that equitable inheritance customs tend to cluster near the historic center of the 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 Section A.4.12). Column 3 in Table A11 confirms that mean elevation negatively predicts the adoption of equitable inheritance (F-Statistic of 220.8). Mean elevation is thus a second plausible instrument.

Fourth and related, the map in Figure A1 shows a striking feature in Germany's South West. 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 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-Stat of 189.5). Distance to rivers in Germany's South-West is thus a third potential instrument<sup>11</sup>

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<sup>11</sup>Note that we instrument the time-varying inheritance customs using non-varying 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.

### 3.4.2 IV results

Next, we proceed to estimate two-stage least-squares regressions. While we have three plausible instruments, there are reasons to be most trusting of the local-level instrument in Germany’s South West, 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. While the model has a lower N (866), we estimate that equitable inheritance significantly improves female representation by 5 percentage points. Column 3 uses the Limes as an instrument. Here, too, we estimate that equitable inheritance—instrumented with Roman rule—is associated with an increase in female representation by four percentage points.<sup>12</sup>

In 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 corre-

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<sup>12</sup>In Table A4, we re-estimate 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.

tion. 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.

[Table 3 about here]

Next, we turn to **class equality**. In Table 4 and 5, we repeat the same analyses for the share of aristocrats 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 models, given that statistical power is low. The IV evidence for our class equality outcome is thus mute.

[Table 4 about here]

[Table 5 about here]

## 4 Mechanisms

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

## 4.1 Wealth inequality

The most immediate historic mechanism is wealth equality. Both the French and American revolutionaries hypothesized that equitable inheritance spurs gender and class equality in the social and political realm by reducing wealth inequality. We measure municipality-level *historic wealth inequality* using the Gini of agricultural land holdings in 1895 (Ziblatt (2009); see 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. While 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 wealth inequality.

[Table 6 about here]

## 4.2 Pro-egalitarian preferences

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

[Table 7 about here]

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 five-point Likert scale, ranging from one (only the state is responsible) to five (only private organizations are responsible). To ease interpretation, we reversed the scale of the items and standardized them. Figure A2 shows a coefficient plot from a regression of the item on equitable inheritance customs, including 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 adopt 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.

## 5 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 of incomes, based on untapped data from German tax records (see Section A.4.3). In Figure A4, we use the aforementioned matching design to show that equitable inheritance is associated with an *increase* in inequality by roughly one percent (GINI) to six percent (log of SD). This marks a substantively meaningful estimate (see Section A.3 and robustness tests). The finding thus underlines the complex intersection of different conceptions of inequality. Income inequality 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.

## 6 Discussion

This paper 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 Table A10 we show that the historic welfare state, if anything, *decreased* the equalizing effect of equitable inheritance customs, while current welfare spending seems to neither exacerbate nor diminish the effect 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.

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. While the nature of this interplay was beyond the scope of our study, we believe the finding underlines the multi-dimensional nature of inequality (Crenshaw, 1991; Abbott, 2016), which is a promising area for future research.

Our paper also pointed out a novel determinant for pro-egalitarian preferences, and, by

extrapolation, redistribution. This link adds to a literature on preferences for redistribution. Broadly speaking, we know little about the determinants of preferences. 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 the customs instill in people a belief that (gender) equality is desirable. Just as important, however, inequitable inheritance customs could foster a desire to make society more equal. Future studies could help parse out with greater clarity how inheritance affects preferences for equality, for instance, by using survey experiments that expose individuals to different scenarios of inheritance.

Finally, the findings presented in this paper may add to a policy debate about inheritance more broadly. While 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 is 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). But systematic evidence from other countries is currently unavailable (Edlund and Kopczuk, 2009), which marks a promising avenue for future research.

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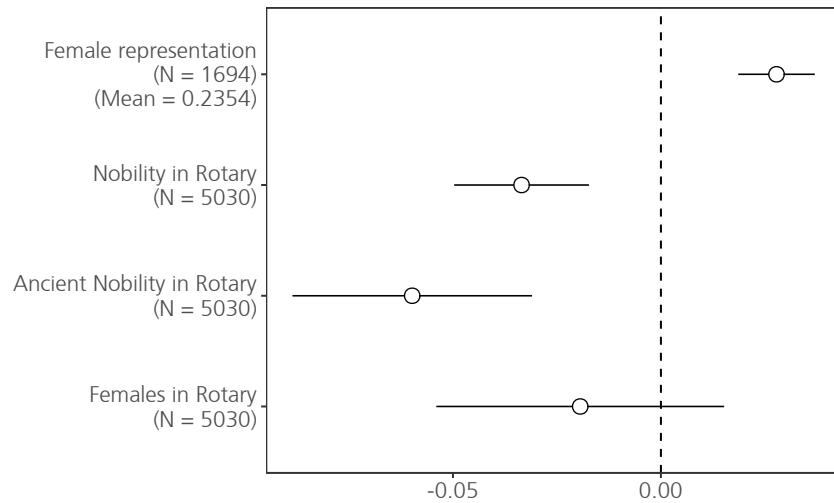
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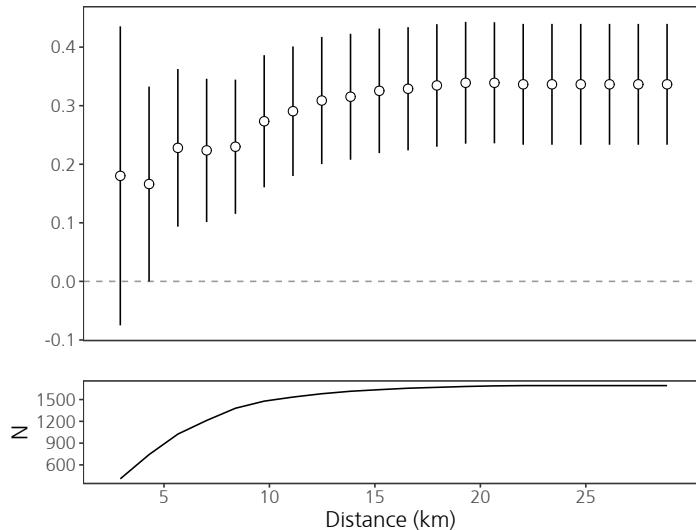
## 7 Figures

Figure 1: Equitable inheritance and inequality



*Notes:* 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 %, while the other three outcomes are standardized. The horizontal lines represent 95% confidence intervals.

Figure 2: Equitable inheritance and inequality—sensitivity



*Notes:* The Figure shows the difference (dot) between equitably and inequitably inheriting municipalities regarding inequality. The dependent variable is an equality index, i.e. the sum of the standardized female and nobility inequality measures. The results are based on paired t-tests after distance matching (see Section A.6). The different estimates correspond to different sub-samples: 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.

## 8 Tables

Table 1: Equitable inheritance and social 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

*Notes:* 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.

Table 2: Equitable inheritance and inequality (controls included)

	Women in local political councils	Women in Rotary clubs	Aristocrats in Rotary clubs	Ancient aris- tocrats in Ro- tary clubs
	(1)	(2)	(3)	(4)
Equitable	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

Notes: 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 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.

Table 3: Female representation in political councils (IV)

	<b>Female representation</b>		
	<i>Mean Elevation</i> (1)	<i>Distance to Rivers</i> (2)	<i>Roman Rule</i> (3)
Equitable	0.136	0.051	0.039
Inheritance	(0.026)	(0.023)	(0.038)
Council size	0.016 (0.003)	-0.008 (0.009)	0.015 (0.003)
Populaton density	0.020 (0.003)	0.018 (0.005)	0.028 (0.004)
Controls	Yes	Yes	Yes
State FE	Yes	Yes	No
F-Stat (1st Stage)	122.19	99.17	46.08
N	3850	866	3851

*Notes:* 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 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)

	<b>Nobility in Rotary</b>		
	<i>Mean Elevation</i> (1)	<i>Distance to Rivers</i> (2)	<i>Roman Rule</i> (3)
Equitable	0.468	0.379	-0.408
Inheritance	(0.556)	(0.365)	(1.103)
Controls	Yes	Yes	Yes
State FE	Yes	No	Yes
F-Stat (1st Stage)	31.16	13.33	7.63
N	598	97	598

*Notes:* 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.

Table 5: Ancient Nobility in Rotary chapters (IV)

	Ancient nobility in Rotary		
	Mean Elevation (1)	Distance to Rivers (2)	Roman Rule (3)
Equitable Inheritance	-0.173 (0.490)	-0.531 (0.524)	-0.108 (0.968)
Controls	Yes	Yes	Yes
State FE	Yes	No	Yes
F-Stat (1st Stage)	31.16	13.33	7.63
N	598	97	598

*Notes:* 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

Table 6: Equitable inheritance and historic land inequality

Wealth (Land) inequality <b>1895</b>	
	(1)
Equitable Inheritance	-0.09 (0.02)
Controls	Yes
N	196

*Notes:* OLS regressions of the land inequality gini 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.

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 pop. 1925		-0.009 (0.003)		0.009 (0.001)
Blue collar share, 1925		-0.026 (0.002)		0.020 (0.001)
State FE	No	Yes	No	Yes
Election FE	No	Yes	No	Yes
N	2,976	2,789	4,651	4,432

*Notes:* Panel regressions of the NSDAP and Communist party vote share in five (NSDAP) and eight (Communist party) elections from 1920–1933. All covariates except for the logarithm of the total population are standardized. The unit of observations is the county.

# **A Online Supplementary Information for: Do Inheritance Customs Affect Political and Social Inequality?**

Anselm Hager and Hanno Hilbig

Table A1: Inequitable inheritance and wealth inequality

<b>Log of Wealth GINI</b>	
	(1)
Equitable Inheritance	-0.024 (0.004)
N	8,144

*Notes:* OLS regressions of the wealth inequality GINI variable on the dichotomous equitable inheritance indicator. We measure wealth inequality by aggregating individual rental income data to the level of the municipality. Standard errors are in parentheses.

Table A2: Equitable inheritance and SOEP household income

	<b>Log monthly household income</b>			
	(1)	(2)	(3)	(4)
Equitable Inheritance	0.038 (0.010)	0.029 (0.010)	0.076 (0.014)	0.045 (0.013)
Male		0.018 (0.009)		0.018 (0.009)
Age		0.001 (0.000)		0.001 (0.000)
Unmarried		-0.308 (0.010)		-0.307 (0.010)
Student		0.032 (0.029)		0.031 (0.029)
Retired		-0.386 (0.018)		-0.384 (0.018)
Unemployed		-0.456 (0.022)		-0.451 (0.022)
Years of education		0.068 (0.002)		0.069 (0.002)
State FE	No	No	Yes	Yes
N	17,758	13,573	17,758	13,573

*Notes:* The Table reports a regression of the log of monthly incomes on the indicated variables. We report coefficients and standard errors (in parentheses). Our data source is the 2002 wave of the German Socio-Economic Panel Survey (SOEP). The unit observations is the individual.

Table A3: Female representation in political councils (panel data; OLS)

	<b>Female representation</b>	
	(1)	(2)
Equitable	0.009 (0.002)	0.004 (0.002)
Inheritance		
Council size		0.017 (0.002)
Populaton density		0.022 (0.001)
Controls	No	Yes
State FE	No	Yes
Year FE	Yes	Yes
N	12847	11689

*Notes:* The Table reports coefficients and standard errors from OLS regressions. The dependent variable is based on a panel of female presence in local political councils, 2001–2012. The control variables are longitude and latitude. The population density and council size variables are standardized.

Table A4: Female representation in political councils (panel data; IV)

	<b>Female representation</b>		
	<i>Mean Elevation</i>	<i>Distance to Rivers</i>	<i>Roman Rule</i>
	(1)	(2)	(3)
Equitable Inheritance	0.179 (0.021)	0.087 (0.024)	-0.017 (0.038)
Council size	0.027 (0.002)	-0.008 (0.006)	0.016 (0.003)
Populaton density	0.014 (0.001)	0.004 (0.002)	0.023 (0.002)
Controls	Yes	Yes	Yes
State FE	Yes	No	Yes
Year FE	Yes	Yes	Yes
F-Stat (1st Stage)	198.34	95.59	36.17
N	11634	2413	11634

*Notes:* The Table reports coefficients and standard errors from 2SLS-IV regressions. The dependent variable is based on a panel of female presence in local political councils, 2001–2012. We include year and state fixed effects, where possible, and control for longitude, latitude, child labor in 1898, welfare spending in 1890 and the prevailing legal code. The population density and council size variables are standardized.

Table A5: Equitable Inheritance, income and income inequality

	<b>Log mean income</b>	<b>Log median income</b>	<b>Log GINI</b>
	(1)	(2)	(3)
Equitable Inheritance	0.047 (0.005)	0.019 (0.004)	0.024 (0.003)
Controls	Yes	Yes	Yes
State FE	Yes	Yes	Yes
N	7977	7977	7973

*Notes:* OLS regressions of (log) income and income inequality measures on the equitable inheritance dummy. Standard errors are in parentheses. The coefficients can interpreted as % changes. Controls include longitude, latitude, and state dummies.

Table A6: IV Results – Equitable inheritance and log mean income

	<b>Log mean income</b>			
	<i>OLS</i>	<i>Mean Elevation</i>	<i>Distance to Rivers</i>	<i>Roman Rule</i>
Equitable Inheritance	0.045 (0.005)	0.515 (0.038)	0.145 (0.019)	0.567 (0.110)
Controls	Yes	Yes	Yes	Yes
State FE	Yes	Yes	No	Yes
F-Stat (1st Stage)		284.99	239	36.21
N	7897	7896	1101	7897

*Notes:* Results from OLS and 2SLS-IV regressions. The dependent variable is the logarithm of the mean income in each municipality. Controls include longitude, latitude, child labor in 1898, welfare spending in 1890 and the prevailing legal code.

Table A7: IV Results – Equitable inheritance and log income GINI

	<b>Log Gini</b>			
	<i>OLS</i>	<i>Mean Elevation</i>	<i>Distance to Rivers</i>	<i>Roman Rule</i>
Equitable Inheritance	0.023 (0.003)	0.155 (0.017)	0.079 (0.013)	0.161 (0.047)
Controls	Yes	Yes	Yes	Yes
State FE	Yes	Yes	No	Yes
F-Stat (1st Stage)		285.24	239	36.26
N	7893	7892	1101	7893

*Notes:* Results from OLS and 2SLS-IV regressions. The dependent variable is the logarithm of the GINI in each municipality. Controls include longitude, latitude, child labor in 1898, welfare spending in 1890 and the prevailing legal code.

Table A8: Equitable inheritance and political inequality (CDU-dominated councils)

	<b>Female representation</b>	
	(1)	(2)
Equitable Inheritance	0.029 (0.004)	0.011 (0.004)
Council size		0.002 (0.004)
Populaton density		0.032 (0.002)
Total population		0.007 (0.003)
Controls	No	Yes
N	2462	2415

*Notes:* OLS regressions of the share of women in local councils on the equitable inheritance dummy. The sample is restricted to councils where the CDU or CSU are the strongest party. Standard errors are in parentheses.

Table A9: Female representation in Rotary chapters (IV)

	<b>Females in Rotary</b>		
	<i>Mean Elevation</i> (1)	<i>Distance to Rivers</i> (2)	<i>Roman Rule</i> (3)
Equitable Inheritance	1.556 (0.775)	1.600 (0.813)	1.671 (1.550)
Controls	Yes	Yes	Yes
State FE	Yes	No	Yes
F-Stat (1st Stage)	31.16	13.33	7.63
N	598	97	598

*Notes:* The Table reports coefficients and standard errors from 2SLS-IV regressions. The dependent variable is the standardized female 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.

Table A10: Equitable inheritance interacted with the size of the welfare state

	Equality index		
Equitable inheritance	0.403 (0.150)	0.841 (0.467)	1.436 (0.188)
Welfare recipients / capita (2015)	0.091 (0.053)		
Welfare spending / capita (1890)	-0.002 (0.067)	0.057 (0.084)	0.074 (0.035)
Equitable inheritance * Welfare recipients / capita (2015)	0.006 (0.105)		
Equitable inheritance * Welfare spending / capita (1890)		-0.123 (0.123)	-0.260 (0.051)
N	541	545	3926

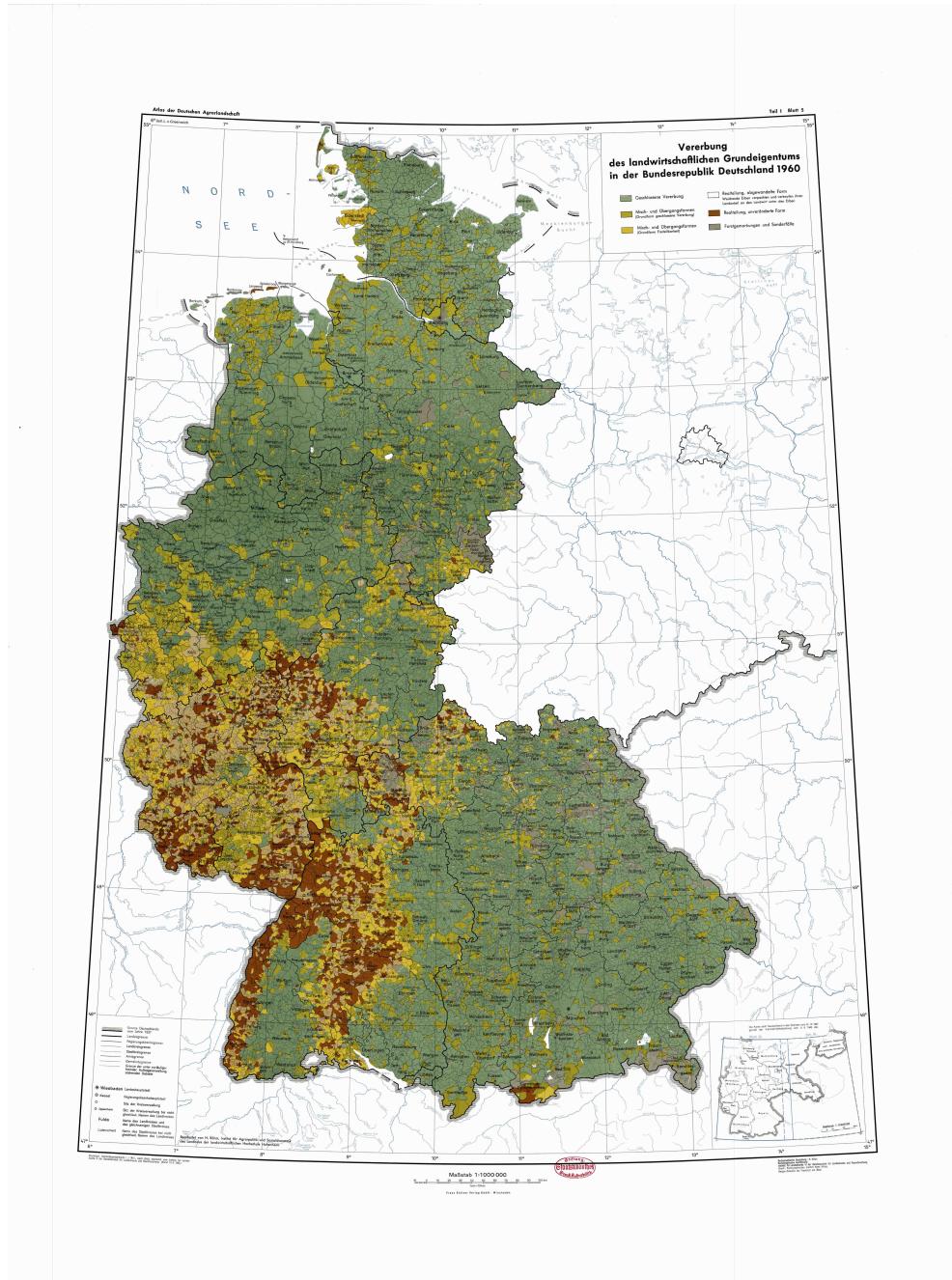
*Notes:* The Table presents results from an OLS regressions. The dependent variable is an index that is the sum of the standardized female representation in councils and the standardized negative share of aristocrats in Rotary Clubs. We use two different welfare state indicators: The per capita number of welfare recipients in 2015 (measured on the county level, see Section A.4.10), and the per capita expenditure on welfare in 1890. We control for child labor in 1898 and the prevailing legal code. The first two specifications only consider municipalities with Rotary chapters, while the last specification considers all municipalities.

Table A11: First-stage IV results

	<b>Equitable Inheritance</b>					
	(1)	(2)	(3)	(4)	(5)	(6)
Roman Rule	0.171 (0.018)					
Peasant Liberation		-0.151 (0.018)				
Mean Elevation			-0.131 (0.009)			
Distance to Rivers				-0.224 (0.016)		
Distance to Wittenberg					-0.067 (0.013)	
Code Civil						0.060 (0.020)
Controls	Yes	Yes	Yes	Yes	Yes	Yes
State FE	Yes	Yes	Yes	No	Yes	Yes
F-Stat	85.39	67.45	217.67	194.63	26.32	8.84
N	3943	3943	3943	875	3943	3943

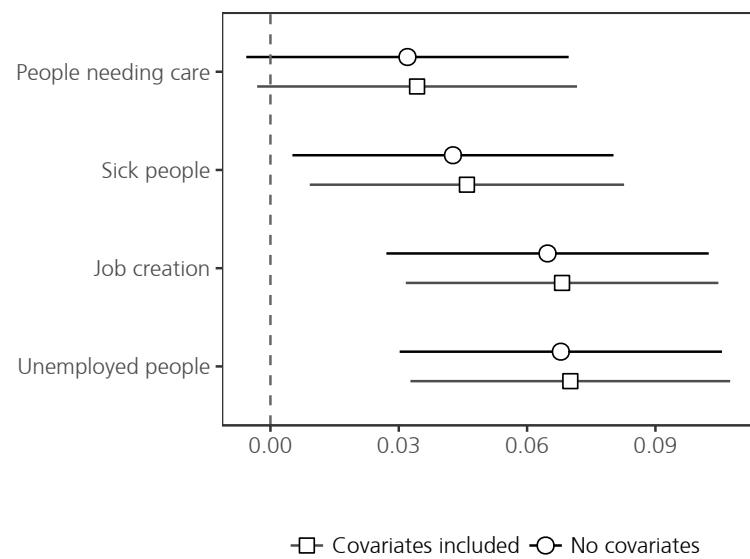
*Notes:* The Table reports first stage regression results using six potential instrumental variables. The dependent variable is the 0/1 equitable inheritance variable. Elevation, distance to Wittenberg and distance to rivers in Baden-Württemberg are standardized. The peasant liberation, Roman rule and Code Civil instruments all range from 0 to 1. The data used here constitutes less than 50% of the total sample, since we only use cases for which local council composition data is available—our main outcome of interest in the empirical section. We use longitude and latitude as control variables. State fixed effects are excluded for distance to rivers, since the variables is only measured for one state, Baden-Württemberg. For the sake of completeness, Table A11 also presents two first stage regressions for two additional theoretical conjectures touched upon in the SI, which are disputed. The first links equitable inheritance to Protestantism. A second theory links equitable inheritance to the French Code Civil. We measure Protestantism by calculating a given municipality's distance to Wittenberg (?). Finally, we measure whether a municipality was shaped by the Code Civil based on a map provided in Figure A7 (see also Section A.4.8). The results in columns 5 and 6, however, show that the coefficients, while pointing in the right direction, are small. Moreover, the variance is significantly higher compared to the three aforementioned theories. We are therefore reluctant to rely on these theories as instrumental variables.

Figure A1: Map of West German agricultural inheritance customs



*Notes:* The map is taken from the *Atlas der Deutschen Agrarlandschaft* and describes historic (c. 1800) and contemporary (c. 1950s) agricultural inheritance customs. It is based on research by Röhm (1957). Dark green depicts inequitable inheritance customs, red depicts equitable inheritance customs, light green depicts mixed customs with historic customs being inequitable, yellow also depicts mixed customs with historic customs being equitable.

Figure A2: Equitable inheritance and pro-egalitarian preferences



*Notes:* The Figure plots point estimates (dot / square) and 95 percent confidence intervals (lines) of regressions of the indicated measures of pro-egalitarian preferences on a dummy for equitable inheritance customs. Dots represent regressions without covariate adjustment, squares represent regressions without covariate adjustment. Covariates include the following SOEP variables: gender, age, marital status, employment status and education. State fixed effects are included.

## A.1 Qualitative interviews

To buttress that historical agricultural inheritance customs continue to shape inheritance patterns to this day, we conducted qualitative interviews across Germany with a variety of individuals, including tax authorities. In one interview, a farmer hailing from the Münsterland stated:

*“It may come as a surprise, but agricultural inheritance is still done like we did it 200 years ago: it’s given to the oldest son. We just want to keep the farms intact. [...] As a matter of fact, it’s not just agricultural inheritance. In this area, even non-farmers inherit like that. It’s partly due to the fact that the oldest son has a responsibility for the family’s wealth.”*

In another case, a woman from Northern Bavaria lamented that her relationship with her grandfather was strenuous because she was a second-born child. Her birth had meant that the family property had to be split in half, as is the custom in the area. The grandfather did not want the property to be split, leading to a tense relationship.

In yet a third case, a woman from Hesse reported that her family’s property was passed on almost exclusively to the family’s only son. Three daughters received a small compensation. But the bulk of the inheritance, particularly a large share in an industrial company, was given to the son. Unsurprisingly, the area is shaped by inequitable inheritance customs.

Bureaucrats in German tax authorities, too, relayed to the authors that equal inheritances are far from being the norm in areas that are shaped by inequitable inheritance customs. This is surprising given that German lawmakers have tried to undermine the practice. Since 1949, German law has granted every child a *Pflichtteil* (minimum legal share; paragraph 2303 *Bürgerliches Gesetzbuch*). In the case of two children and no spouse it amounts to 25 percent. But, the share falls well below 50 percent. And significant wiggle room and loopholes exist. This holds particularly true when agricultural properties or real estate is involved. As a result,

inheritances are often unequal—particularly in areas shaped by inequitable customs. And, women are particularly likely to be sidelined (?).

## A.2 Determinants of inheritance customs

Historians have proposed three competing theories for the adoption of equitable inheritance customs. They are discussed in turn.

A first set of scholars argues that *cultural* differences explain variation in inheritance customs. According to this theory, inequitable inheritance is a remnant of Germanic practices, while equitable inheritance is a vestige of Roman culture (?Huppertz, 1939). While reliable historical evidence is sparse,<sup>13</sup> Germanic inheritance customs are widely believed to have been structured in reference to families (*Sippe*). All members of German families—save families in serfdom—owned the land together. The death of the patriarch did not substantially alter the structure of the land; it remained in the family, which was led by the eldest son (?). On the contrary, Roman inheritance customs were rooted in a firmly individualist tradition (?). Property belonged to individuals, not entire families. As such, Roman inheritance customs would make it more likely for property to be divided among children, given the absence of any norm stipulating that land must stay apiece within the family.

A second set of scholars contends that *political* developments, particularly the liberation of peasants, gave rise to variation in inheritance customs. According to this *peasant liberation* theory, equitable inheritance is closely linked to peasants' freedom to own (Abel, 1956). Scholars adopting this view commonly take the advent of the Carolingian dynasty

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<sup>13</sup>One of the first accounts on German inheritance customs can be found in Tacitus' *On the Origin and Situation of the Germanic Peoples*, published around 98 CE. Tacitus remarks that the Germans “till every year new fields, and there is still (untilled) land left over” (?; Chapter 26). Early commentators interpreted Tacitus' remark to mean that the Germans engaged in a form of agricultural communism whereby properties are kept in one piece within families and communities (?). Most modern historians, however, agree that the Germans endorsed private property early on. Only select areas of villages, such as hunting grounds, were common property (?).

as their starting point. The rule of Charles the Great (c. 742 to 814 CE) led to a profound re-configuration of the peasant class. While in classical antiquity, peasants and noblemen had not differed substantially in terms of their income and political clout (?), the reign of Charles marked the German nobility's steady rise to power. The elite's appropriation of new lands led to an ever-growing number of serfs who cultivated the *demesne* lands. Importantly, the logistical burdens implicit in this growth meant that serfs had to be granted significant personal liberties. The result was the emergence of semi-free peasants.<sup>14</sup> The growth in personal liberties and economic prowess significantly increased peasants' confidence. They began to demand what they deemed rightfully theirs: the right to own and inherit property. As a result, several regions of modern-day Germany witnessed new forms of peasant inheritance. Examples are the *Landsiedelleihe* or the *Freistift*—two forms of leasing property. Thus, writes ?, 58, “the improvement of property rights in the form of inheritance led farmers to partly inherit their property, because they wanted all their descendants to share in their possession.”<sup>15</sup>

A final group of scholars has proposed an *economic* theory of inheritance customs, which links equitable inheritance to fertile soils and profitable crops. Scholars proposing such economic considerations typically use the High Middle Ages as their starting point—a period of increasing peasant migration and professionalization. Schulze (1974), for instance, demonstrates that the *Königsfreie*—peasants who were granted significant autonomy by the Carolingians, which included the right to inherit property—mostly settled in border areas of Francia. These areas had traditionally offered little profit, partly owing to poor infrastructure.

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<sup>14</sup>This included semi-free peasants such as *Ackerbürger* and *Grundholde*. Of particular importance for the Carolingians were *Königsfreie* (King's freemen)—a class of semi-free peasants who were part of the Carolingian army.

<sup>15</sup>Some rulers, particularly in Northern Germany, reacted to the growing demands from peasants by instituting the *Meierhof* system, whereby farms of the noble or ecclesiastical classes were occupied by administrators. The system was aimed at effectively countering inheritance.

Agriculture was notoriously hard. As a result, these areas did not witness equitable inheritance as would have been predicted by the peasant liberation theory (Abel, 1956). Rather, the low returns on investment meant that property was passed on to only one son (inequitable inheritance) so as to prevent the land from getting too small to make a profit. In a similar vein, Röhm (1957) notes that “where parceled corridors existed or still exist [...], the division of land [...] is observed more often than in areas with more or less scattered settlements.” (Röhm (1957, 3)).<sup>16</sup>

### A.3 Income and Income Inequality

The main body of the paper presents evidence from a range of empirical specifications in favor of Tocqueville’s hypothesis. Equitable inheritance is associated with more socially equal municipalities. Two plausible mechanisms—wealth equality and pro-egalitarian preferences—were also shown to be positively associated with equitable inheritance. In this section, we briefly turn to a related question: namely, whether inheritance customs also affect incomes.

Interestingly, social scientists have formed conflicting predictions about the effect of equitable inheritance on incomes. On the one hand, ?, 281 note that inequitable inheritance leads to “larger estates.” Evidence from the United States buttresses this conjecture. Large plantations, particularly in the South, were historically almost exclusively inherited using primogeniture (?), producing a steady flow of income. Conversely, equitable inheritance is argued to fragment farms, which renders them economically futile.

On the other hand, there are also arguments that link equitable inheritance to income

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<sup>16</sup>In addition to these three theories, we have come across two additional theoretical conjectures. These explanations, however, have received scant attention in the literature and are largely disputed. The first links equitable inheritance to Protestantism. Notably, ? argues that Protestant areas encouraged equitable inheritance as it epitomized the Protestant ideal of “equality among brothers” (? , 14). Her arguments, however, have come under criticism for lacking a sound statistical basis (?). A second theory links equitable inheritance to the French Code Civil. But historians widely agree that inheritance customs date back much longer (?).

growth. ?, for instance, argue that equitable inheritance may lower labor supervision costs as all children have an incentive to work. Bertillon (1911), too, argues that incomes rise under equitable inheritance given that it leads to lower population growth as peasants aim to counter the atomization of their property. And Ekelund, Hébert and Tollison (2002) argue that “partible [equitable] inheritance should also play a role in economic growth,” by fostering “competition and capitalist exchange” (Ekelund, Hébert and Tollison (2002, 666)).

Besides an effect on incomes, an inquiry into the interplay of inheritance customs and social inequality should also explore whether inheritance affects income inequality. Income inequality 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. This argument thus corresponds to studies that link economic growth to income inequality (??).

Such considerations were also common among the commentators of the French and American revolutions. As ?, 15 writes, in America “[f]ew are very wealthy; few are poor; and every man has a fair chance of being rich.”<sup>17</sup> Indeed, de Visme Williamson (1976, 102) argues that the early American society was shaped by an “equalitarianism [...] among pioneers, [whose] only inequalities were those of ability and work”, which may lead to an unequal distribution of incomes if the talent distribution is skewed.

To estimate the effect of equitable inheritance customs on incomes and income inequality, we proceed in three steps.

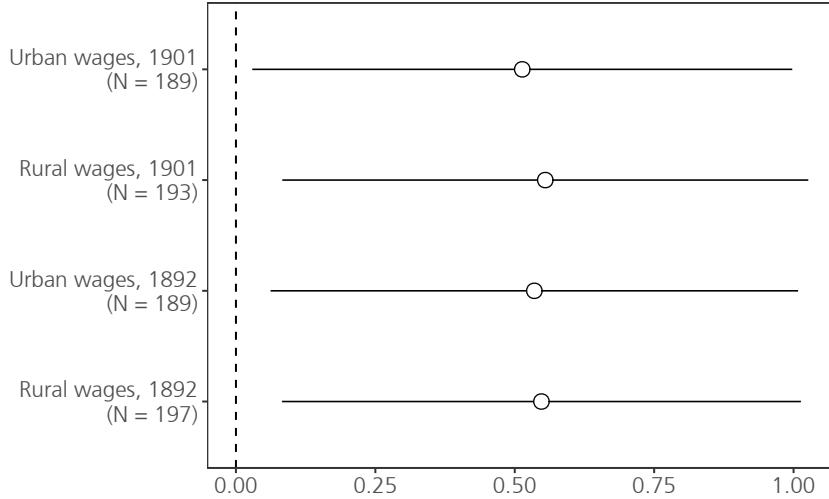
First, we assess whether equitably inheriting municipalities had higher per capita incomes in the 19<sup>th</sup> century. To do so, we use data on municipality-level *historic incomes* for male laborers in 1892 and 1901 (?; see Section A.4.3). In Figure A3, we show that equitable

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<sup>17</sup>It should not be forgotten that such economic equality only prevailed among white men and “was surrounded by an array of other fixed, ascriptive systems of unequal status, all largely unchallenged by the American revolutionaries” (? , 549).

inheritance customs are associated with higher wages in 1892 as well as 1902. The positive estimates are detectable for both urban as well as rural wages. The confidence intervals, however, are wide due to the low number of clusters. For this reason, we are also unable to conduct a matching procedure or to include fixed effects into the regression.

Figure A3: Equitable inheritance and wages in Prussia



*Notes:* The Figure plots the difference (dot) between equitably and inequitably inheriting municipalities regarding wages in Prussia in 1892 and 1901. The dependent variable is provided by ? and measures the average daily wages for male laborers in 1892 and 1901 in Marks. Estimates are based on OLS regressions, controlling for longitude, latitude, child labor in 1898, welfare spending in 1890 and the prevailing legal code. Outcomes are standardized. The line represents the 95 percent confidence interval.

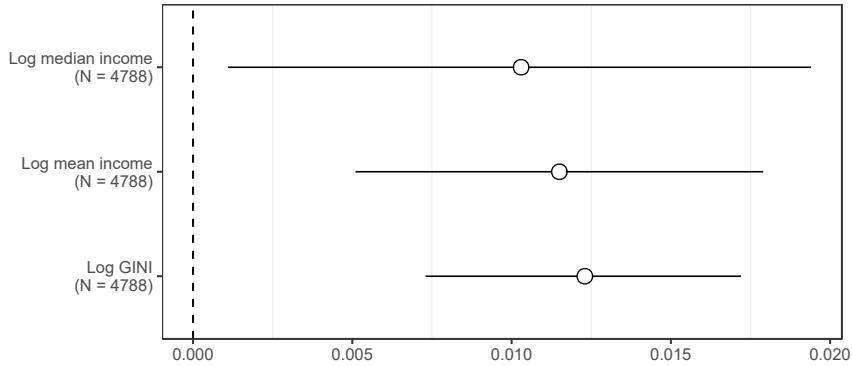
Second, we assess whether equitable inheritance customs are associated with greater per capita income in 2014. To do so, we measure municipality-level contemporary monthly incomes using data from the German Federal Statistical Office (see Section A.4.3). In Figure A4, we show that equitable inheritance customs are associated with an increase in the logarithm of income, based on a paired t-test after geographic matching of municipalities. Specifically, equitable inheritance is associated with a rise in mean incomes by 3 percent and a rise in median income by 1 percent.<sup>18</sup> Below we also confirm that the analysis is robust

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<sup>18</sup>We test the robustness of this finding using data from the Socioeconomic Panel (Table A2). Here, too,

to a simple cross-sectional OLS (Table A5) as well as to the aforementioned instrumental variable models (Table A6 and A7). As such, the analysis corroborates that income is likely positively affected by equitable inheritance customs.

Figure A4: Equitable inheritance, absolute income and income inequality



*Notes:* The Figure plots the difference (dot) between equitably and inequitably inheriting municipalities regarding absolute income and income inequality based on a paired t-test after geographic matching of municipalities. The line represents the 95 percent confidence interval. Coefficients can be interpreted as a percentage changes.

Having established a positive historic and contemporary association between equitable inheritance and income, we turn to our final outcome of interest: income inequality. We measure *income inequality* using the municipality-level Gini of income, based on heretofore untapped data from German tax records (see Section A.4.3). In Figure A4, we assess whether equitable inheritance is associated with greater income inequality in 2014 (data on historic income inequality in Germany is, to our knowledge, not available). Specifically, we use the aforementioned geographic matching between equitably and inequitably inheriting municipalities, and conduct paired t-tests. The Figure shows that equitable inheritance is associated with an *increase* in inequality by roughly one percent (GINI) to six percent (log of

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equitable inheritance customs predict incomes positively. These data are, of course, less reliable as they rely on survey evidence, not administrative tax records. The analysis is worthwhile, however, as it addresses potential concerns about an ecological fallacy, given that the tax data measure income at the municipality-level though our treatment operates on the family-level.

SD). This marks a substantively meaningful estimate. Below we also confirm that the analysis is robust to a simple cross-sectional OLS (Table A5) as well as to the aforementioned instrumental variable models (Table A6 and A7).

## A.4 Data sources

### A.4.1 Gender inequality

Our first measure of gender inequality is the share of women in German municipal councils (???). In so doing, we draw on fine-grained data collected by Ruth Ditlmann and Rafaela Dancygier (ongoing research project). For each municipality, we calculate the percentage of female members in municipal councils. Currently, the data by Ditlmann and Dancygier is limited to municipalities with more than 2000 inhabitants. Therefore, all results on female representation are based on a subset of about 46% of all municipalities in West Germany. To examine variation in female representation over time, we also draw on data from a panel that tracks women on German local councils between 2001 and 2012 (?). These data, however, include fewer municipalities.

Our second measure of gender inequality is the share of women in the social elite. To measure “elite representation,” we obtained a list of all members of *Rotary International* in Germany. Rotary members are mainly composed of business and civic leaders and consider themselves to be part of the social elite (we discuss the socio-economic status of Rotary members in more detail Section A.7).

Based on this list, we are able to determine (1) the total number of members of each chapter as well as (2) the number of women. We combine the two to obtain the share of women in Rotary chapters.

#### A.4.2 Class inequality

Our measure for class inequality is the share of aristocrats in local elite networks. Here, too, we rely on the aforementioned list of members of the 600 *Rotary International* clubs in Germany.<sup>19</sup> To identify aristocratic members, we use German naming conventions, which are unique to aristocrats. For example, names may include the words “von” or “zu” (meaning “of”), which indicate the geographic origin of an aristocratic lineage. The list provides us with two distinct measures: A general aristocracy measure as well as an “ancient aristocracy” measure. The latter are individuals from the German ancient nobility (*Uradel*).

Ancient nobility describes nobles that can trace their noble rank to the 14th century or earlier. This contrasts with Briefadel, which refers to those nobles who were awarded their title by the monarchy in the early modern or modern period. The concept of Uradel is connected to the system of medieval fiefs, where vassals were granted heritable property or rights by an overlord. Uradel members were obliged to prove a history of “knightly life”, as well a practice of marrying within their social class. To obtain data on the prevalence of ancient nobles in the Rotary chapters, we rely on a list of noble lineages compiled by <https://heraldik-wiki.de/>. We match the names in the list to the names of the nobles in the Rotary member list. Since the Heraldik-Wiki data includes information on how far back lineages data, we are able to distinguish Uradel from the modern Briefadel nobles.

For each municipality where a Rotary chapter exists, we then calculate the share of aristocratic and ancient aristocratic members.<sup>20</sup> Finally, we supplement the Rotary data with a

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<sup>19</sup>Note that when using our matching procedure, we infer a given German municipality’s share of women and aristocrats in Rotary using the nearest club. Since residents of municipalities are assigned to the nearest chapter, one can plausibly infer a given municipality’s share of women and aristocrats in Rotary based on data from the nearest chapter. We note, however, that the results are robust when restricting our analyses to the 600 municipalities where Rotary chapter exist (see Section 3.1).

<sup>20</sup>We were unable to measure the share of aristocrats in local municipal councils due to privacy restrictions

short section that discusses the socio-economic status of Rotary members (see A.7), where we show that Rotary members are recruited from the strata of the German society.

#### A.4.3 Income and income Inequality

While incomes and income inequality were not part of the revolutionary debates, we still collected data sources to assess the hypotheses in the academic literature. To measure inheritance customs' effect on income and income inequality we use historic as well as contemporary data.

We measure historic incomes using data from the Prussian Economic History Database (iPEHD; ?). IPEHD contains a rich set of county-level variables taken from Prussian censuses in the years between 1816–1901. Specifically, we obtain average daily wages for male laborers in 1892 and 1901, measured in Marks. For each year, wages are recorded separately for urban and rural laborers, which leaves us with a total of four outcome variables. The Prussian territory, however, only covered part of contemporary Germany, leaving out large areas in Southern Germany including Bavaria, Baden and Württemberg. Moreover, we only have income data for 190 of the available 281 Prussian counties in the data base. The overall sample size is thus rather low. In 21% of those 190 counties, equitable inheritance is the most prevalent inheritance custom.

We measure contemporary incomes using data from the German Federal Statistical Office. Specifically, when preparing their tax forms, German citizens communicate their annual income to the relevant tax authorities. We gained access to these data—subject to strict privacy restrictions. We constructed a variable, monthly income, that divides the yearly income by 12. The data is summarized in Table A12.

Our final outcome of interest—analytically distinct from social equality—is income in-

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– we do not have data on the names of council members.

equality. We were unable to obtain reliable historic data on income inequality. Moreover, measuring today’s income inequality at the local level is a difficult task; in our case it requires data on the distribution of incomes at the municipality level. Most surveys that include information on personal income have too few observations to make statements about income distributions at the municipality level.<sup>21</sup> To bridge this problem, we were able to gain access to data from all German tax records. The data was provided to us by the research data center of the German Federal Statistical Office. The office keeps records of roughly 50 million tax records. We collaborated with the office, providing them with appropriate statistical code in order to construct local GINI indexes at the municipality level. This unique source of data—heretofore untapped—is our primary measure for income inequality. We summarize the data in Table A12.

#### A.4.4 Wealth and wealth inequality

Our first and most immediate hypothesized intermediate outcome, linking equitable inheritance to social equality, is wealth equality. In order to scrutinize the historic effect of equitable inheritance on wealth equality, we use data on agricultural land inequality in 1895. The data was originally collected by Ziblatt (2009), who obtained it from the 1898 agricultural census in the German Empire. The census contains information on the size of over 5 million agricultural units in 1,004 counties in 1895. In each county, agricultural units are divided into 18 size categories. For each of these categories, the total number of farms, as well as the area held by those farms, is recorded. Ziblatt (2009) aggregates the data to the level of the electoral district (*Reichstagswahlkreis*) and then calculates the GINI index of agricultural landholding. To combine our inheritance data with the landholding GINI, we aggregate

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<sup>21</sup>To give an example, the 2002 SOEP has about 19,000 observations. Given 8,500 German municipalities, this leaves two individuals per municipality, assuming that participants are distributed equally, which makes statements about distributions impossible.

Röhm (1957)'s measure of inheritance customs to the level of the 1895 German electoral districts. This leaves us with an overall sample size of 196 electoral districts.

Second, we cooperated with the German tax authority to devise a measure of local-level wealth inequality in order to test whether unfair inheritance customs continue to predict wealth inequality today. This data source is the same as described in Section A.4.3, i.e. the universe of tax returns in Germany. Specifically, we used rental income from owned properties as a proxy for wealth and constructed a municipality-level wealth inequality Gini index. In the German context, we cannot use taxes on capital and capital gains since banks directly deduct the taxes from the capital gains, and they therefore do not appear on the tax returns. After consulting with the German Federal Statistical Office, we therefore chose taxes on rental incomes from owned real estate as a proxy for personal wealth.

Table A12: Summary statistics for municipality-level income and wealth variables.

	<b>Mean</b>	<b>SD</b>	<b>Min</b>	<b>Max</b>	<b>% Missing</b>
Mean income (Euro)	26269.22	4602.16	4734.74	113942	7.99
Median income (Euro)	20288.60	2399.01	1788.50	37717.50	7.99
Income GINI	0.48	0.05	0.26	0.86	8.04
Mean rental income (Euro)	3104.01	1547.01	0	28485.33	6
Median rental income (Euro)	523.45	525.23	0	11537	6.15
Rental income GINI	0.63	0.09	0.03	0.93	6.07

*Notes:* The table contains summary statistics on the income and wealth inequality. All variables are measured on the level of the municipality, and are based on individual tax records. We use rental income to proxy for personal wealth. For a detailed description of the variables, see Sections A.4.4 and A.4.3

#### A.4.5 Pro-egalitarian preferences

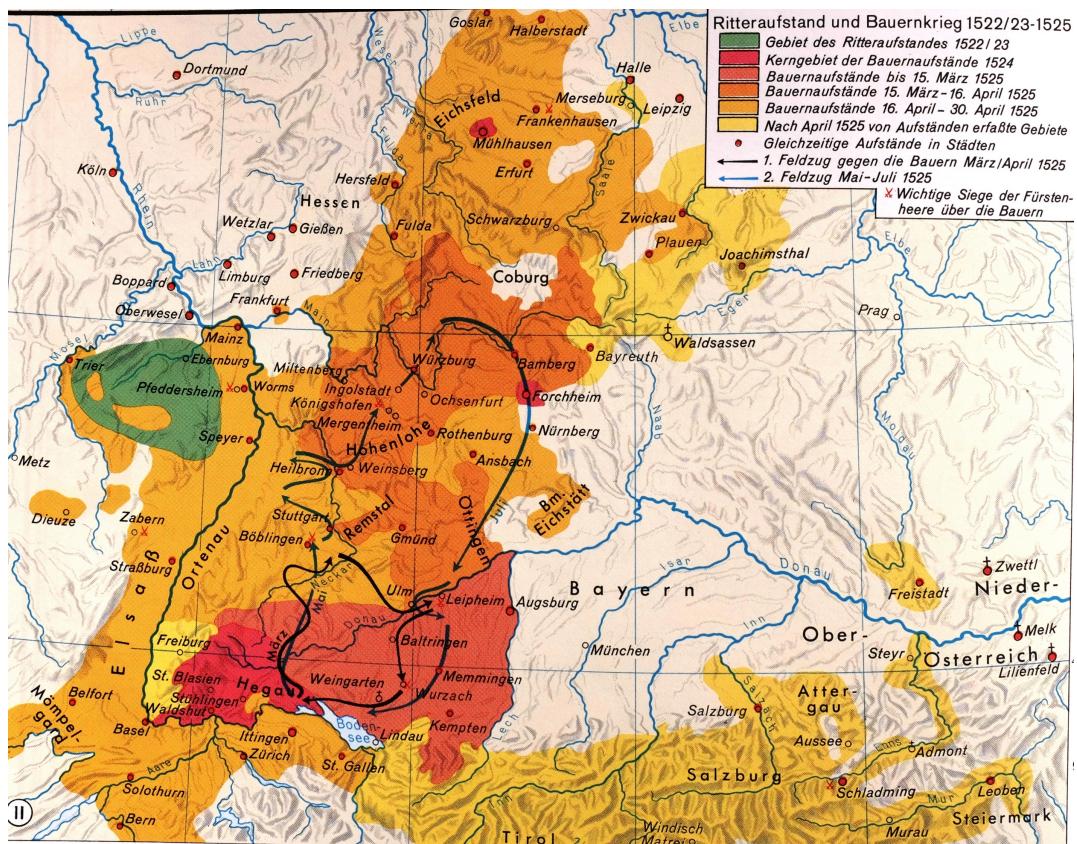
A second hypothesized intermediate outcome, linking equitable inheritance to social equality, are pro-egalitarian preferences. To parse out the historic effects of equitable inheritance on pro-egalitarian preferences, we obtained data from all elections between 1920 and 1933. Specifically, we examine voting for the communist party and the NSDAP in the national elections. The data source is ?, who has compiled an complete panel data set that includes

all democratic elections held during the inter-war period. The data is the level of the county (*Kreis*), of which there are between 670 and 770 for each election. In addition to the voting data, the ? data also includes information on the occupational composition, confession and unemployment in the counties.

To merge the ? voting records with the (Röhm, 1957) survey data, we aggregate Roehm's municipality to the level of the interwar counties. The result is a continuous measure that approaches 1 as a larger share of the country practiced equitable inheritance.

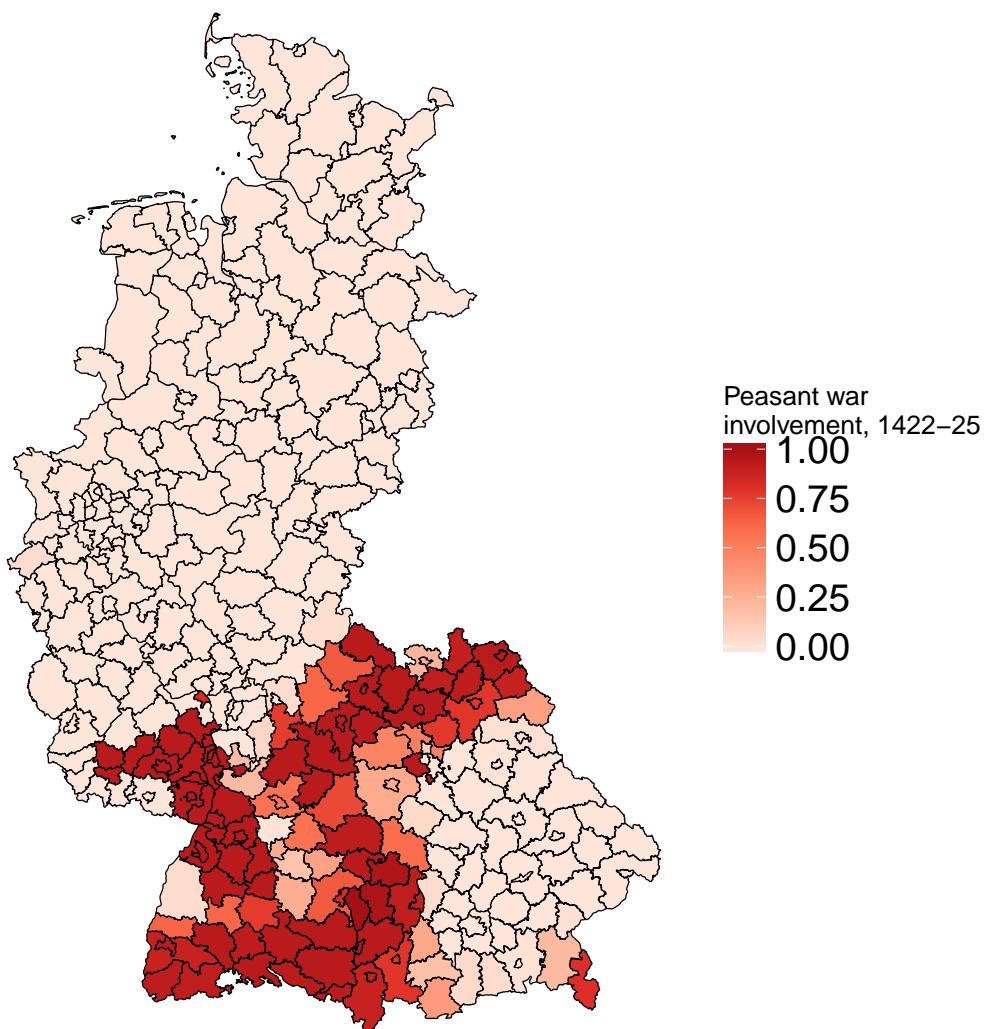
One may be concerned, however, that voting behavior is not a direct measure of pro-egalitarian preferences. While we believe this concern is less valid for the elections between 1920 and 1933, we have also collected contemporary evidence on pro-egalitarian preferences from the German Socio-Economic Panel Survey (SOEP). SOEP is a longitudinal survey containing socioeconomic information on private households in Germany. The SOEP has been fielded since 1984. It contains information on the location of all households in the survey. Therefore, we were able to exactly match the equitable inheritance variable to the SOEP. Given circa 8,500 municipalities, we thus have an average of 2.5 respondents per municipality. Following Alesina and Fuchs-Schündeln (2007), we measure pro-egalitarian preferences using four items, asked in the year 2002, concerning the role of the state in providing social security. The main question reads “At present, a multitude of social services are provided not only by the state but also by private free market enterprises, organizations, associations, or private citizens. What is your opinion on this? Who should be responsible for the following areas?” We selected four areas: “financial security in case of unemployment,” “financial security in case of illness,” “financial security for persons needing care” and “creation of employment opportunities.” Answers are recorded as five-point Likert scales ranging from one (only the state is responsible) to five (only private organizations are responsible).

Figure A5: Map of German peasant wars



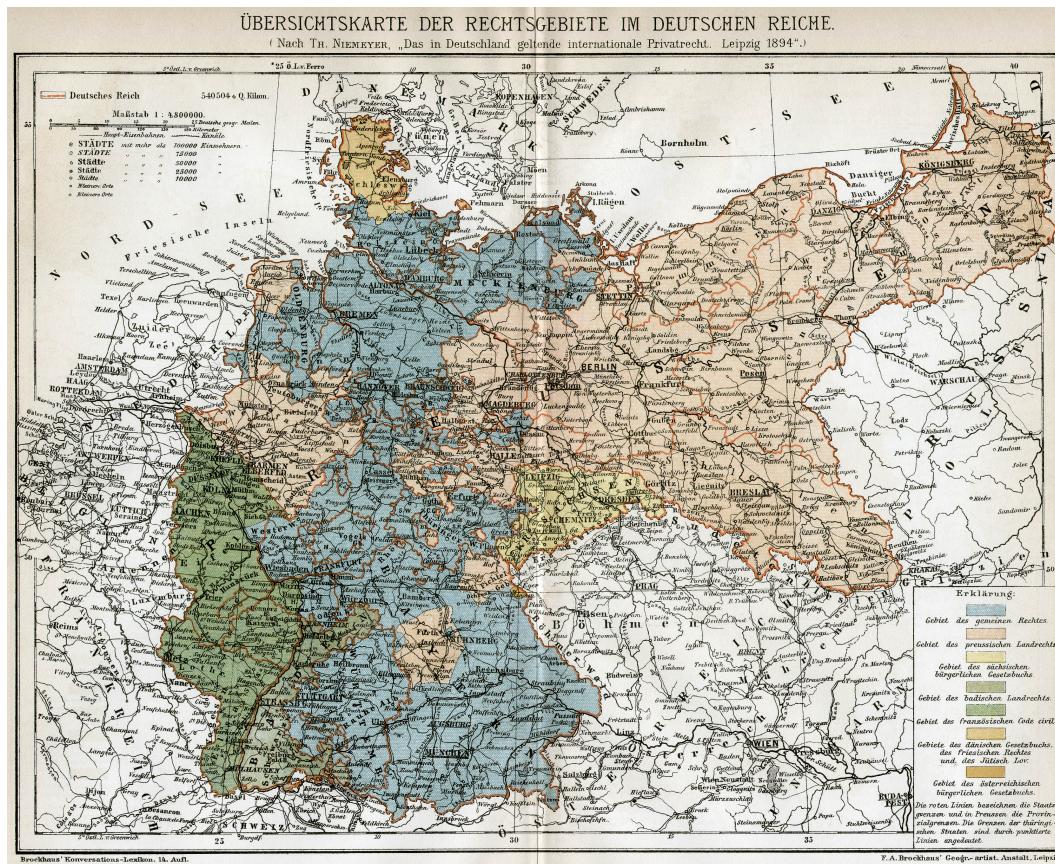
*Notes:* The Figure plots a map of the German peasant wars (c. 1522-1525), taken from ?.

Figure A6: Map of peasant wars by county



*Notes:* The Figure plots a map of German counties' involvement in the peasant wars (c. 1522-1525). The map is based on ?. See also Figure A5.

Figure A7: Map of Code Civil adoption



*Notes:* The Figure provides a map of the legal systems present in Germany in 1894 (based on ?).

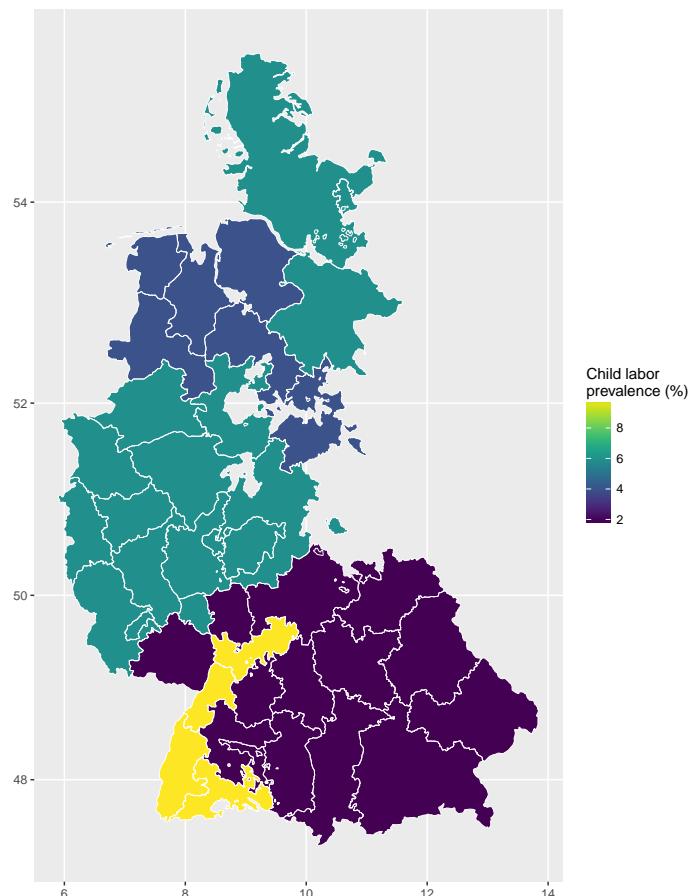
#### A.4.6 Additional controls for voting, 1920-1933

To rule out potential confounding, we control for a range of additional variables in the regression that explain voting during the interwar period (as shown in Table 7). As before, we use the data set compiled ?. Based on previous research that tries to explain the rise of the Nazis after World War I (see ??, we select four covariates: The unemployment rate in 1925, the share of Catholics in 1925, the logarithm of the population in 1925 and the share of blue collar workers in 1925. All covariates are measured on the level of the county.

#### A.4.7 Child labor

We obtain a measure of the prevalence of child labor from Boentert (2007). The data contains information on child labor prevalence on the level of the *kleiner Verwaltungsbezirk* (small administrative unit), which is larger than a county, but smaller than a federal state. In West Germany there is data for a total of 41 of those administrative units. For each administrative unit, the data contains an interval range that indicates how common child labor was (e.g. “5 – 6.9% of all children were working”). We use the mean of this interval range as our measure. As we show in Figure A8, clusters of administrative units tend to have similar values for the variable, which means that there is not a lot of variation in the child labor measure. For all analyses, we then assign a current municipality the child labor variable based on the 1898 administrative unit that the current municipality is contained in.

Figure A8: Prevalence of child labor in Germany in 1898

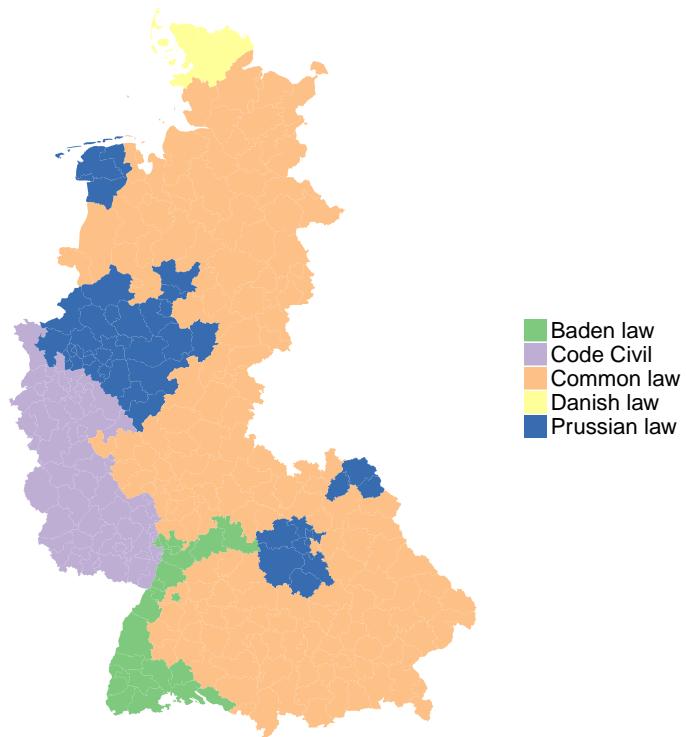


*Notes:* The Figure plots the prevalence of child labor, as measured by the percentage of school-age children are working in 1898.

#### A.4.8 Legal codes

The legal code variable is based on a map by ?, who plots the distribution of five different legal codes in Germany. As before, we overlay the map with the current municipalities, and calculate the prevailing legal code in 1894 based on where each current municipality is located. In Figure A9, we plot the distribution the the five different legal codes.

Figure A9: Legal codes in Germany (1894)



*Notes:* The Figure shows the prevalence of legal codes in Germany in 1894. To ease visual interpretation, we have the respective codes to the level of the county.

#### **A.4.9 Historic welfare expenditures**

To measure the intensity of the welfare state in the 19th century, we employ data from the Yearbook of the German Cities (*Statistisches Jahrbuch Deutscher Gemeinden*, ?). More specifically, we use per-capita expenses that benefit the poor (*Ausgaben zu Zwecken der öffentlichen Armenpflege*) from the year 1890. Since the Yearbook of the German Cities only includes information on 44 larger cities, we rely on extrapolation: For each current municipality, we assign the 1890 welfare spending value based on closest city for which we have data. Implicitly, we therefore assume that welfare spending in neighboring regions should be somewhat similar. In Figure A10, we plot the distribution of the welfare expenditure variable.

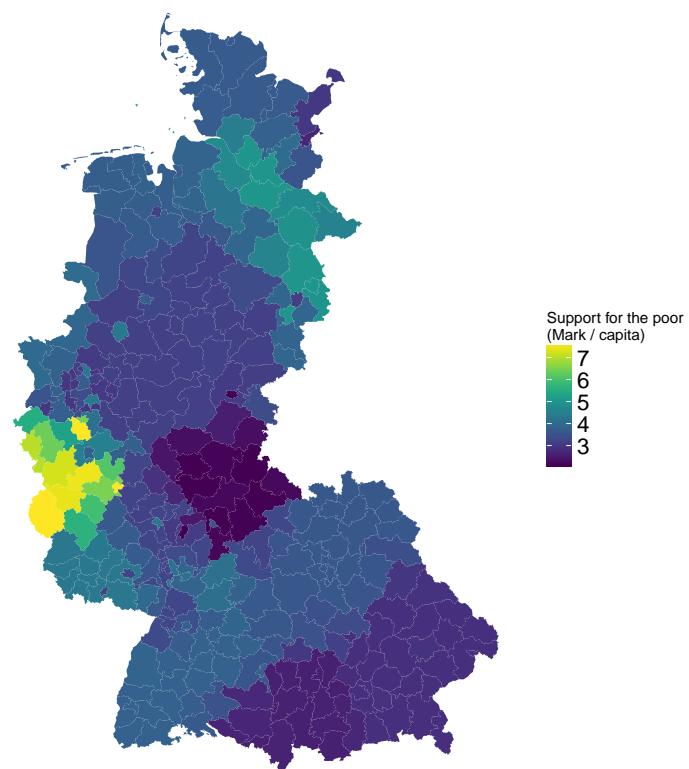
#### **A.4.10 Present-day welfare recipients**

To answer the question whether the effect of inheritance customs is mediated by the size of the local welfare state (see Table A10), we compile a data set of the per-capita number of welfare recipients in each German county as a proxy for the extent of the welfare state. We chose county-level data, since this information is not available at a smaller level of aggregation. We then assign each municipality the share of welfare recipient variable based on the county where the municipality is located.

#### **A.4.11 Peasant liberation**

One theory of the origins of equitable inheritance contends that multigeniture is more likely where peasants demanded more rights and liberties. We proxy for peasant liberation using the German peasant wars (1522 and 1525). Specifically, we digitize a map provided in ? (see Figures A5 and A6) to construct a county-level peasant war involvement measure.

Figure A10: Welfare spending in 1890



*Notes:* The Figure plots welfare spending in Germany in 1890, as measured by per-capita expenditures for the poor. For ease the visual interpretation, we plot counties instead of municipalities.

#### A.4.12 Agricultural suitability

The presence of multigeniture has been explained in the context of favorable climate and soil conditions, which may 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 (?). We then calculated the mean elevation for each municipalities. Since German municipalities are relatively small, we are confident that elevation does not vary greatly within municipalities, and that the mean is therefore a valid measure for agricultural suitability.

#### A.4.13 Roman rule

To test the theory that areas occupied by the Roman Empire are more likely to practice multigeniture, we construct a binary Roman rule dummy using data from the Digital Atlas of Roman and Medieval Civilizations (?). This dummy variable takes on the value 1 if a present-day municipality is located in a region that was part of the Roman Empire.

### A.5 Structural Equation Models

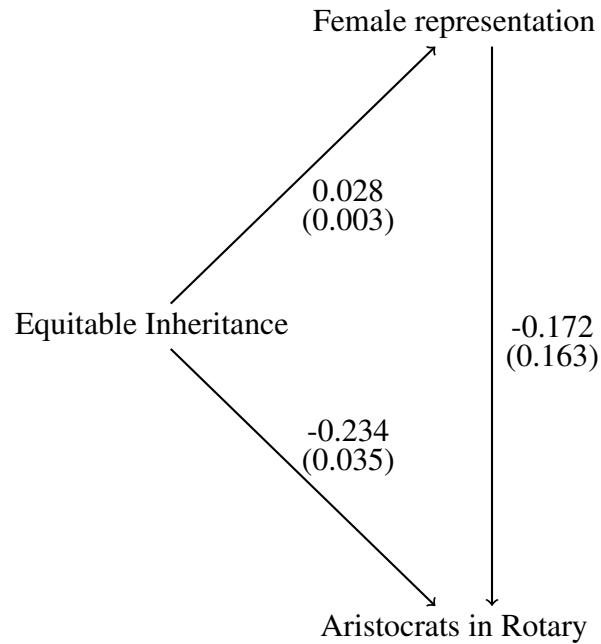
To supplement our approach linking equitable inheritance customs to social inequality, we also examine how these measures may be interrelated in more complex ways. To facilitate this, we use Structural Equation Modeling,<sup>22</sup> which allows us to simultaneously estimate the relationship between several variables in our model. In a first step, we consider whether gender inequality leads to an increase in class equality. Concurrently, we estimate the effect of equitable inheritance on each of the inequality outcomes. In Figure A11, we present the results: The SEM confirms what we have already seen: Equitable inheritance diminishes both class and gender inequality. At the same time, we observe that gender equality decreases

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<sup>22</sup>We use the `lavaan` package in R to estimate the models.

class inequality, as greater female representation is associated with fewer aristocrats in local elite organizations. These results paint a more complex picture of the interdependent links between class, gender and primogeniture.

Figure A11: Structural Equation Model



*Notes:* The Figure plots results from a structural equation model (using equal inheritance customs, gender inequality and class inequality). The indicated values are the regression coefficients. Standard errors are given in parentheses.

## A.6 Matching procedure

To take advantage of the fine-grained variation of inheritance customs, we construct a micro-level geographic matching procedure. This allows us to create more suitable counterfactuals, and to control for a variety of potential (unobserved) confounders that operate at the macro-level. As was highlighted in the main document, the distribution of inheritance customs in Germany has the unique property that the spatial variation is pronounced even on small geographical levels. It is not uncommon that two neighboring villages are shaped by opposite inheritance customs. We use this fact to construct a geographic matching design.

Conceptually speaking, if two nearby municipalities follow different inheritance customs, this can be thought of as both being close to the “cut-off” between equitable and inequitable inheritance. In order to draw causal inferences, we must invoke a crucial assumption, namely, independence of conditional outcomes and treatment given that two municipalities are nearby:

$$Y(T = 1), Y(T = 0) \perp\!\!\!\perp T | A$$

Here, let  $A$  be a vector that includes longitude and latitude, so that nearby municipalities get very similar values for  $A$ . Two geographically close municipalities are thus highly comparable. In our benchmark regression, we allow matches at most 27 kilometers apart. To ascertain robustness, we vary this number in Figure 2 and show our results to be robust to even the narrowest computationally feasible distance (4 kilometers).

As discussed in the main body of the paper, the distribution of inheritance customs is unbalanced. Inequitable inheritance customs greatly exceed equitable inheritance customs. We, therefore, use matching with replacement: A control unit can be matched to multiple treated units. Matching with replacement involves a trade-off between bias and variance (?). If we match with replacement, the average match quality increases, since the mean distance

between matched pairs of municipalities will be smaller. However, some municipalities in the control group will necessarily be re-used. This lowers the number of distinct observations that are used to calculate the counterfactual mean. Consequently, the variance of the estimator increases (??).<sup>23</sup>

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<sup>23</sup>If we were to match without replacement, we would be faced with two alternatives: (1) discarding a large chunk of the treatment municipalities or (2) allowing for bad matches, where matched municipalities are far away from each other. The first scenario leads to a sizable loss of statistical power, while the second scenario makes our identification assumption much less credible. Therefore, we follow common practice in the econometric literature and argue that matching with replacement is the best choice given the imbalanced spatial distribution of equitable inheritance in Germany (?).

## A.7 Socio-economic composition of Rotary Clubs

To corroborate the fact that Rotary club members selected from the upper strata of society, we proceed as follows. Our primary source is the exhaustive list of all Rotary members in 2012. In addition to the name and the Rotary chapter, we also have information on the occupations of any given member. Since the Rotary member book is not in a readily usable format, we use automated text analysis methods to extract information on the occupations of Rotary members. In Figure A12, we present the most common occupations and occupation-specific terms, which are featured in the Rotary member book. As can be seen, Rotary members disproportionately occupy positions that are associated with high levels of prestige and compensation.

To quantitatively assess the socio-economic status of Rotary members, we combine the Rotary member data with data from the 2013 German Socio-Economic Panel Survey (SOEP). By matching Rotary member occupations to the occupations of the SOEP survey respondents, we are able to directly compare the socio-economic status of Rotary members to a representative sample of the German population. First, we computed the socio-economic status based on the widely used International Socio-Economic Index of occupational status (?). Second, we matched the most common Rotary occupations to occupations in the SOEP, for which we have ISEI data. In Figure A13, we plot the distribution of the ISEI socio-economic status for the full SOEP sample<sup>24</sup>. The plot also shows the overall sample average (solid line). The dashed line represents the average for the subset of occupations that are typical for Rotary members (dashed line).<sup>25</sup> Based on the standardized occupational prestige scale, we observe that Rotary members score, on average, 1.5 standard deviations

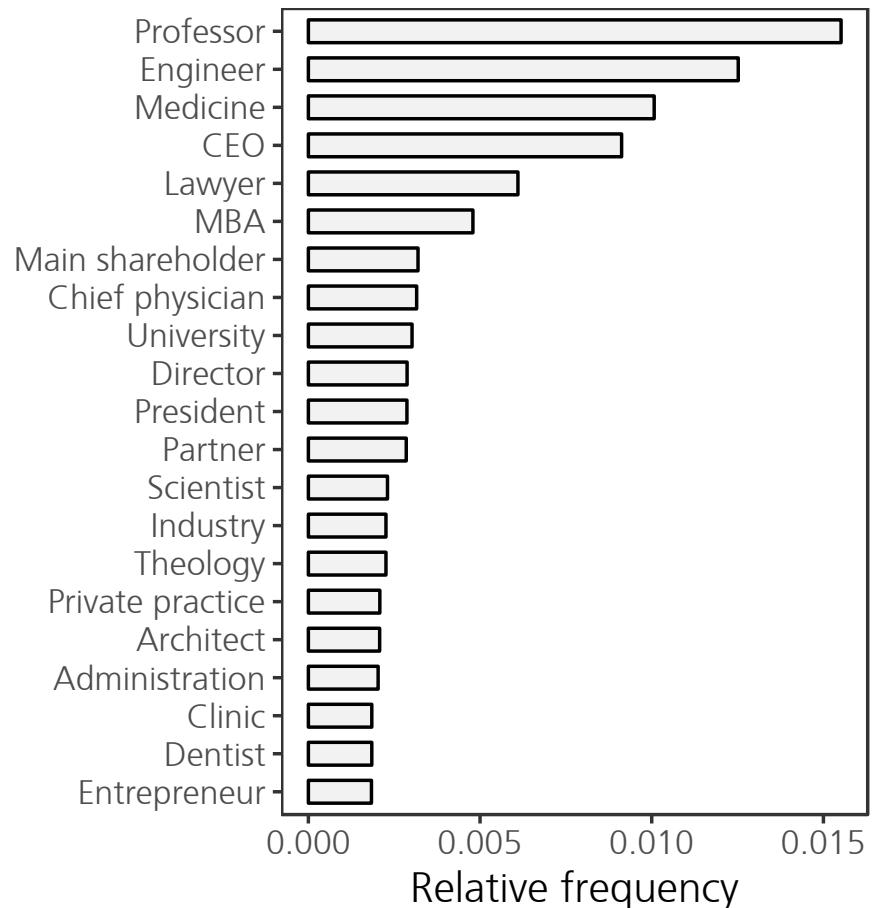
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<sup>24</sup>We only include survey respondents who are in paid work at the time of the survey

<sup>25</sup>We plot a weighted average. Specifically, we weight each occupation by the frequency with which it appears in the Rotary member list, giving more weight to more common occupations.

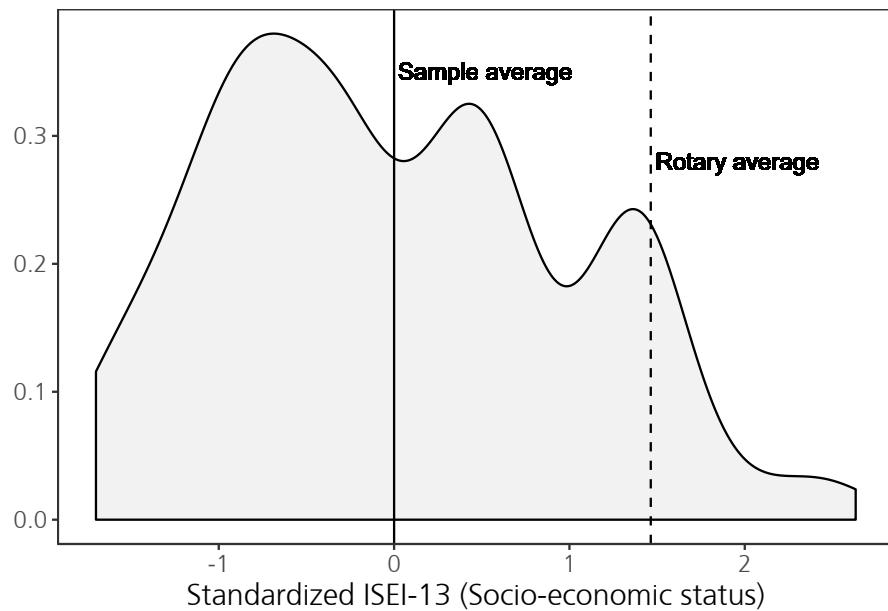
higher on the occupational prestige scale. Since the distribution is right-skewed, the difference becomes even starker when looking at the cumulative distribution function: The average Rotary member has a higher socio-economic prestige than 94.4% of all employed SOEP respondents. We repeat this exercise in Figure A14, where we consider wages. Again, we base our wage estimates for Rotary members on SOEP respondents that are in the same occupations as the Rotary members. A similar picture emerges: The average Rotary member earns about 6,330 Euros (based on 2013 wage data), which is more than 95.8% of the of employed SOEP respondents. Taken together, these results suggest that most Rotary members are selected from the highest strata of society.

Figure A12: Professions of Rotary club members



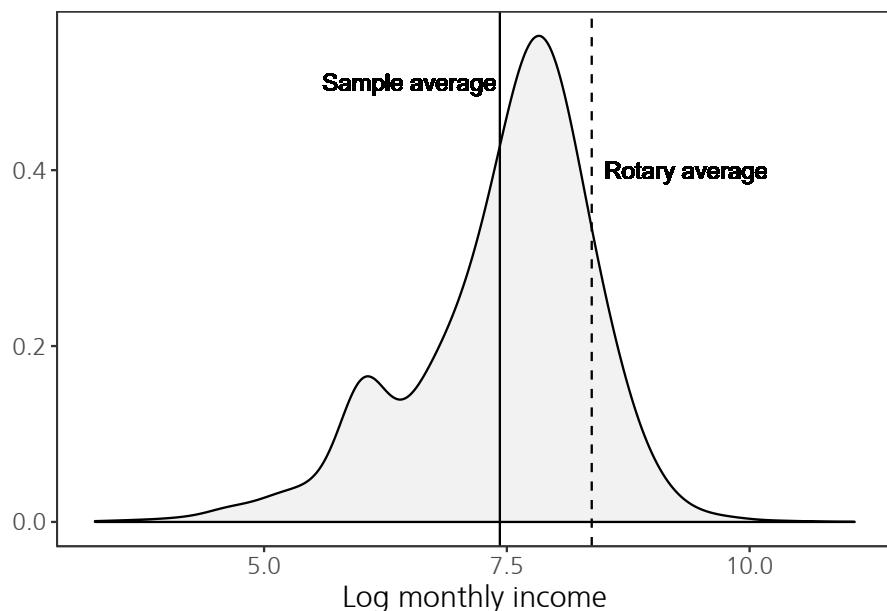
*Notes:* The Figure plots the frequency of professions in Rotary clubs based on the complete member list of all Rotary Clubs in Germany.

Figure A13: German socio-economic status distribution



*Notes:* The Figure plots the standardized socio-economic prestige (ISEI-13 score) for a representative sample of German citizens (based on the SOEP). The solid vertical line marks the sample average. The dashed vertical line is the average socio-economic prestige for Rotary members (we can only infer prestige for members with common occupations; the average is thus likely biased downward).

Figure A14: German wage distribution



*Notes:* The Figure plots the log of monthly wages for a representative sample of German citizens (based on the SOEP). The solid vertical line marks the sample average. The dashed vertical line is the average wage of Rotary members (we can only infer wages for members with common occupations; the average is thus likely biased downward).

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