

THE SOCIAL CONSEQUENCES OF ZAPOTEC INHERITANCE¹

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Al definir la "aldea" y el "hogar" como las dos unidades estructurales de mayor importancia en la sociedad Zapoteca, Downing encuentra que la primera es estable y bien definida, mientras que la segunda es inconstante y más amorfa. Se sugiere que las leyes que gobiernan la herencia, puedan ser responsables, las líneas de descendencia no son reconocidas. La herencia puede redefinirse como un intercambio social recíproco, en el cual los progenitores proporcionan la tierra sobre la cual sus descendientes organizan sus hogares, y los descendientes proporcionan alimentos, vestimenta y techo a sus padres. Agregado a otros intercambios entre padres e hijos (hogar a hogar), se ha creado un sistema de alianza que perdura a pesar de los cambios en el número y composición del hogar, contribuyendo así a la solidaridad de la aldea.

Two questions pervade the study of inheritance: one economic, the other sociological. The former concerns the impact that inheritance of property has on wealth distribution (Wolf 1966; Nash 1966, 1968; Downing 1973). The latter concerns the influence that inheritance has on the relations of peoples, groups, institutions, or societies. An example of this sociological query and the topic of this paper is

161

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"what are the consequences of inheritance on social solidarity?"

Leach (1961), Goody (1962, 1969, 1970) and Collier (1971) have probed this sociological problem and discovered that inheritance may have both positive and negative impacts on social solidarity in societies with discrete, corporate kin groups. For example, Collier has shown that inheritance in a Zinacantan hamlet reinforces lineage solidarity when property is transferred through males, but may also reduce lineage solidarity if property is transferred through females or by sale.

It is uncertain, however, if inheritance reinforces, weakens, or has no effect on social solidarity in societies lacking corporate kin groups, i.e. groups that persist beyond the lifespans of their founders. I wish to argue that inheritance does effect social solidarity in such a society. Investigations among the Zapotec Indian-peasants in southern Mexico show that inheritance is an important element in an elaborate sequence of social exchanges. These exchanges structure alliances between households. Overall, this alliance contributes to the solidarity and continuity of the Zapotec's maximal societal group, the village, by structuring the interactions of their minimal societal groups, households.

Zapotec Societal Structure

Societal structure refers to "discrete groups . . . without an individual (ego) as a point of reference (Pospisil 1964:399)." In the Valley of Oaxaca, Zapotec societal structure consists of two primary groups: villages and households.

Villages are the basic building blocks of Zapotec regional organization and approximate what Wolf (1957) has identified as "closed corporate communities." The following characteristics of Valley Zapotec villages are relevant:

1. Villages are nucleated settlements surrounded by agricultural fields and have a clearly demarcated territory. Within this territory, agriculture lands are usually held by households that may hold several non-contiguous parcels.
2. There are strong intra-village pressures to prevent these lands from falling under the control of peoples from other villages.
3. Village membership is achieved by birth with the provision that at least one parent be a village member.
4. Villages are heavily endogamous. Intra-village marriages account for over 95% of all marriages.
5. Each village has a hierarchy of political, judicial, and religious offices (cargos) which are periodically and reluctantly occupied by villagers without compensation.
6. Most social interaction occurs within the boundaries of a village and between members of the same village.
7. Zapotecs deemphasize the past in their kinship system by showing no emphasis on ancestor worship, little veneration of the dead in their burial customs, and placing minimal importance on tracing genealogies

beyond the third ascending generations from ego.

8. Sibling relations are extremely brittle. Brothers often take opposing sides in political disputes and ignore each others' personal and financial troubles. In contrast, parent-child relations are extremely strong; violating this bond is considered a serious moral transgression.
9. Finally, and most important for this argument, Zapotec villages are corporate groups that persist far beyond the lifespans of their members. In *Landlord and Peasant in Colonial Oaxaca*, Taylor (1972) contrasts continuity of Oaxacan Indian communities with those of North Mexico.²

The history of land in colonial Oaxaca represents a significant departure from the North Mexican model . . . the degree of change in the Valley was different, and the effect of the rise of the hacienda on Indian tenure less severe. In much of the viceroyalty Indians lost a good deal of land, as millions fell victim to epidemics and haciendas surrounded, and in some cases completely overran, their towns. In contrast, Valley caciques and pueblos retained a considerable amount of land, certainly more than enough to meet their basic needs and keep them independent of Spanish landowners. (Ibid:195).

The continuity of village lands and organization has continued through the Independence period into modern times. Compared to North Mexico, the Revolution of 1910 was of little consequence to villagers in the Oaxaca Valley.

The Revolution in the countryside was essentially a struggle for land and economic independence, not for political freedom. Valley towns, firmly rooted in the land, had never really lost what Zapata and his followers were fighting for. Thus, they showed relatively little interest in the revolutionary cause (Ibid:199).

Neither conquest, revolutions, epidemics, famines, droughts, floods, haciendas, nor changes in market demands for major cash crops (wheat to castor beans to chick peas) have destroyed the basic integrity of most Valley Zapotec villages.

Just as villages form the basic elements of regional organization, households are the primary units whose membership consists of persons sharing a common kitchen. Like other Mesoamerican households, Zapotec households are "multi-purpose units" (Nash 1968:318); that is, units of socialization, production, consumption, daily interaction, and to a less extent, ritual. Although production is usually based on subsistence agriculture, many households also have non-agricultural specialties (Vargas Baron 1968, Plattner 1965) or supplement their income by working outside the village.

The household is a point of reference for rights and obligations of villagers to the community and to one another. Selection of positions for the civil-religious-judicial offices is made with reference to households, not individuals; only one adult male in a household is obligated to serve at one time. Village taxes are collected from each household, regardless of its composition. Levies for village projects, such as electrification, village fiestas, building

of public water systems, and government matching funds are divided equally between households. Likewise, compadrazgo obligations occur between households. The important credit institutions of *guelagetza*, *ayuda*, and *tequio* (Beals 1970) are rights and obligations of households and an individual's reputation, prestige, and wealth are measured with reference to his (or her) household.

Despite their overwhelming importance in Zapotec societal structure, households are not corporated groups, i.e. they do not persist beyond the lifetimes of their founders. A pattern of patri-neolocal residence results in newlyweds establishing independent households after a brief period of patrilocal residence with the husband's parents. This sequence continues until all children are married and the youngest inherits the natal housesite. Shortly thereafter, parents begin a pattern of multi-local residence, living for a short period of time in each of the households of their married children. The beginning of the parents multi-local residence or their death terminates the rights and obligations of their household. Conversely, the establishment of a neolocal residence by their children begins a new household.

Some indication of this volatility of households was achieved by recensusing household composition in two villages: Diaz Ordaz (Downing 1973) and San Miguel del Valle (Klug 1965). Between 67 and 40 percent of the households were

found to have structurally changed in less than two years. This definition of structural change excludes shifts in household composition due to either the birth and death of a household member.

In summary, villages are highly stable societal groups which have maintained their integrity for at least four hundred years. They endure despite radical alterations in the political and economic atmosphere of the region and the nation. In contrast, households are mortal and show considerable metamorphosis within a short span of time. This contrast may be considered a major problem for valley ethnologists. What principles or organizations account for village solidarity? What endures?

Zapotec Inheritance and Social Exchange

Previous answers proved unacceptable to the social context of the Zapotec problem. Goody (1962) and Collier (1971) found that the solidarity of a social group, such as a village, could be changed by forces influencing the solidarity of its corporate descent groups, such as lineages. Unfortunately, Zapotecs lacked corporate descent groups. Others had argued that succession, the transmission of political office might account for social solidarity, but Zapotecs did not consider succession a salient criteria for political office. Leach's (1961) work in Pul Eliya would seem the most relevant to this problem; he had looked for the basis of solidarity in a community where neither descent nor succession

were crucial principles of social organization. He reasoned that the principles of inheritance and a system of land tenure relationships give continuity to what he called "compounds," which were territorial groups that shared common rights to land. Here again, Zapotecs do not retain any compound-like pool of land tenure rights in tact beyond the lifetime of the household's founding couple, i.e. estates were fragmented at inheritance. Nevertheless, I suspected that Leach's explanation would be the closest answer, and, with modification, it might be argued that inheritance, as a set of principles, maintains Zapotec social solidarity. I was half right.

The rules of Zapotec inheritance were formulated by comparing normative statements to actual behavior. This comparison generated three rules:

- (1) All heirs receive relatively equal portions of an estate,
- (2) the youngest son inherits the natal house and house-site, and
- (3) one's heirs are one's children.

The first rule concerns the bilateral appropriation of property and is of significance here only insofar as the sex of the heir slightly skews an otherwise mathematical equal division of an estate (Downing 1973:140-171). The second rule insures the undisputed transfer of a particular parcel of property holding ritual significance and need not concern

us here. The rule that one's children are one's heirs, however, requires further discussion.

Barring unforeseen circumstances, parents share the role of testators at inheritance. The division of property is usually a gradual process occurring while a couple is alive and during their twilight years. Similarly, heirship is shared by the testator's child and the child's spouse. Zapotecs emphasize that transfer of inheritance involves reciprocal obligations between testators and heirs, that is, parents and children. Testators provide their heirs with property and heirs reciprocate by providing testators with "food, clothing and shelter" throughout their dotage. Thus, in contrast to a strictly economic exchange, inheritance is what Mauss (1925) would call "obligatory" and "interested." Furthermore, Zapotec inheritance meets Blau's (1964) criteria for a social exchange: (1) the exchange is vaguely stated and implies unspecified obligations on the part of the recipient, (2) it entails an element of trust that others will fulfill which are often unstated obligations, (3) it strengthens or creates feelings of obligation, gratitude and trust, and (4) the benefits of this exchange have no common medium by which it may be evaluated. In brief, inheritance is a social exchange between parents and their children; testators (parents) exchange land for the return gift of superannuity, i.e. food, clothing, and shelter from their heirs (children).

TABLE 1 HIGH FREQUENCY EXCHANGES BETWEEN PARENTS AND CHILDREN THROUGHOUT THEIR LIFE

DISTINGUISHING CRITERIA	Nursing infant	Toddler until first year of elementary school		Elementary school children	
APPROXIMATE AGE	Birth - 2 yr.	2 - 7		7 - 13	
SEX	♀	♂	♀	♂	♀
ZAPOTEC LIFE STAGE	BIDO BEZ	BINI'NI GIU'WE	BINI'NI CA'APE	BINI'NI RO'O	CA'APE
EXCHANGES FROM CHILDREN TO PARENTS	Negligible (perhaps social approval)	"Carry things around the house" "Obey parents" "Care for younger siblings"	"All the exchanges of young, male toddler plus:" "Help mother in kitchen with small tasks"	"All the previously mentioned things and feed animals" "Run errands to other households and store" "spying on other households" "household tasks outside the house"	"All previous exchanges plus:" "heavier kitchen duties" "run errands to other households" "spying" "wash clothes" "household tasks inside the yard"
EXCHANGES FROM PARENTS TO CHILDREN	"Food, clothing, shelter, socialization and affection. Curing expenses."				
	"Baptismal expenses shared with godparents"			Help with housework	small allowance for sweets
RESIDENCE OF CHILDREN	IN HOUSEHOLD OF ORIENTATION				

POSSIBLE "MARKER EXCHANGES" ARE UNDERLINED

CYCLES

Unmarried Persons		Married Persons (young)		Married Persons (older) [with all children married]		Dead Persons	
14 - 20		20 - 60		60 +		Deceased	
♂	♀	♂	♀	♂	♀	♂	
SOLTER	CA'AP RO'O	BINGUL	UNA' GUL	BINGUL DO'O	NANGUL DO'O	TUGUL	
<p>"All previous exchanges plus:</p> <p>"Herd animals to send money home if working outside the village</p> <p>"spying, but decreasing</p> <p>"errands to market outside of village</p> <p>"represent household at fiestas</p> <p>"work in fields</p>	<p>"Make tortillas</p> <p>"go to mill if accompanied by elder female</p> <p>"send money to parents if working outside the village</p> <p>"represent household at fiestas</p>	<p>"Post-marital residence with his parents</p> <p>"assist in parent's fields</p> <p>"curing and burial expenses of parents if they die</p>	<p>"Help her husband's or her own parents if they give a fiesta</p> <p>"share all exchange relationships of her husband</p>	<p>"Food, shelter, and clothing</p> <p>"burial expenses</p>	<p>"Food, shelter, and clothing</p> <p>"burial expenses</p>	<p>"Burial obligations on "Day of the Dead"</p> <p>"pay outstanding debts with help of other siblings</p>	
<p>"Send to secondary school outside the village, if child doesn't work</p> <p>"teach him to farm</p>	<p>Teach her household tasks</p> <p>less frequent, send to secondary school</p>	<p>"Pay costly marriage ceremony</p> <p>"food, clothing, shelter for sons and their wives while they reside patrilocally</p> <p>"help children and wives establish new household</p>	<p>"Dowry</p> <p>"if parents wealthy, may give land to daughter and son-in-law at this time</p>	<p>"Pass inheritance</p> <p>"give advice on cargos, cultivation</p> <p>"assist in socialization or care of grandchildren</p>	<p>"Pass inheritance</p> <p>"give advice on ritual cooking</p> <p>"care for grandchildren periodically</p>	<p>If an unmarried child died before his parents, ritual obligations on "Day of the Dead"</p>	
		BRIEF PERIOD OF PATRILocal RESIDENCE, THEN MOVE NEOLocALLY, EXCEPT FOR YOUNGEST SON.				IN HOUSEHOLD OF PROCREATION	

Inheritance is not the only social exchange between parents and children. In proper perspective, it is only one element in a series of exchanges. These exchanges involve parents and children interacting in roles other than testators and heirs.

Table 1 summarizes the high frequency exchanges between parents and children throughout the life cycles. The distinguishing criteria used in this chart was derived from the Zapotec life stages (Merida Blanco, personal communication 1967). The table also lists the approximate ages at which a person is referred to by these terms. These stages are not based on chronological age, rather they signal behavioral patterns. One stage shades into the next. Although it would be impossible to list all the interchanges between these two pairs for one stage of the life cycle, these data demonstrate that inheritance is only one of many social transactions taking place between parents and children.

In other words, inheritance is a part of a larger social process involving most village households. Phrased in terms of societal groups, this social exchange is between a household established by parents (testators) and households established by their children and these children's spouses (heirs).

The Aggregate Pattern

The multifarious exchanges between parents and their children (and their children's spouses) create an alliance structure among Zapotec households. Figure 1A shows an idealized kinship diagram. Married couples who have established their own households are outlined with a dashed line. Unmarried persons (marked X on the figure) merge into their parental household as members of its exchange group. Couples are linked on this diagram because they form an exchange unit from the perspective of other, similar groups in the community and hold joint tenure over the household's property. Figure 1B simplifies this picture and shows the exchange groups, excluding unmarried persons that have not established their own households. And figure 1C indicates the directions of high frequency exchanges between households and may be interpreted as indicative of direction of alliances resulting from frequent exchanges.³

This simple alliance model is consistent with the preceding summary of Zapotec social organization. The three inheritance rules are sufficient to recreate the directionality of rights and obligations through time. Also, the model shows greater stress on parental as opposed to sibling obligations. And lastly, the model indicates that relations between alternating generations should be weaker than those between adjacent generations, a prediction consistent with the Zapotec's de-emphasis on descent reckoning, ances-

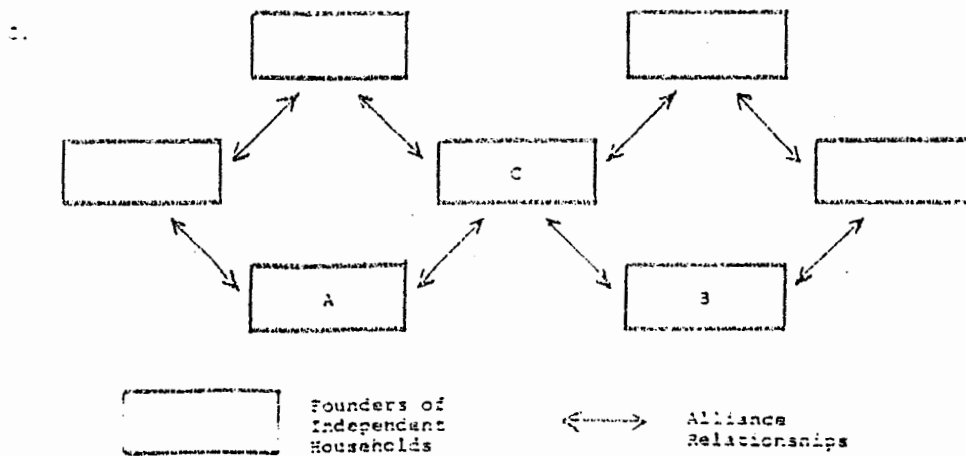
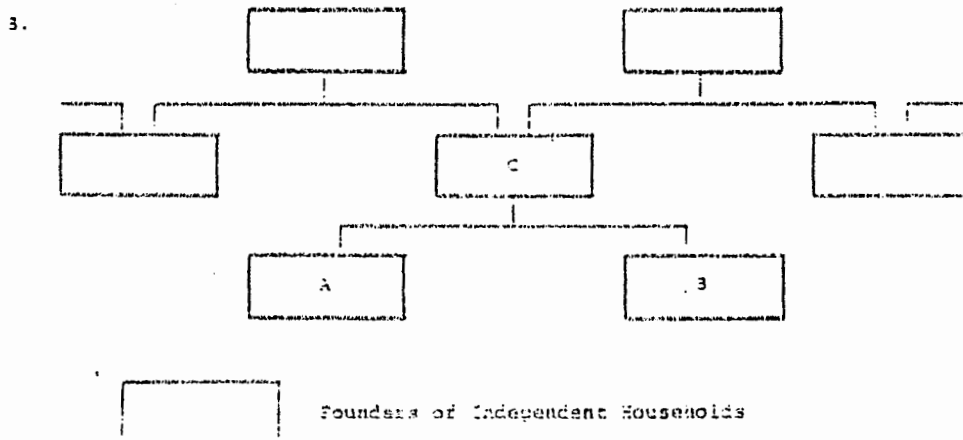
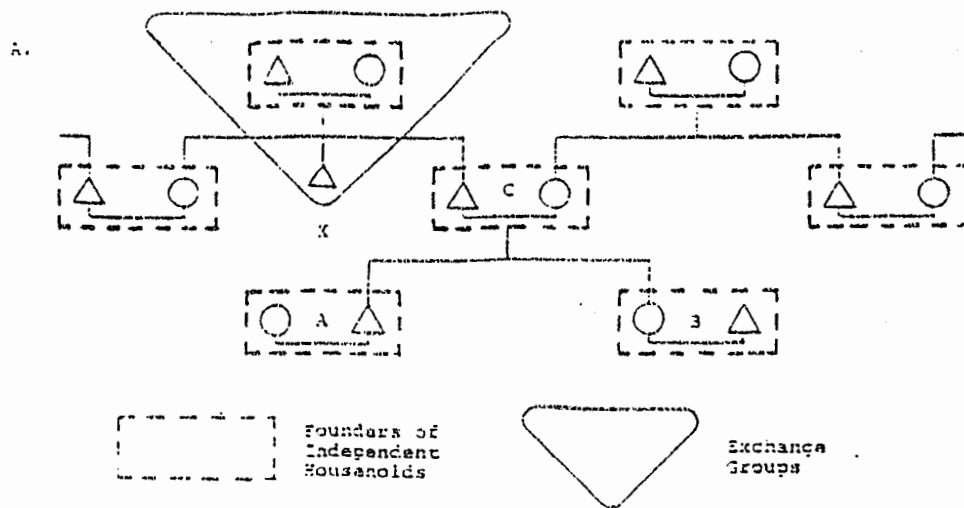


FIGURE 1 EXCHANGE ALLIANCES OF ZAPOTEC HOUSEHOLDS

tor worship, and burial customs.

Social Solidarity

Earlier, the question was raised: what endures? Part of the answer seems to be that this system of alliances between households regenerates a basic structure of independent households with specific obligations to one another through time. This system of dyadic alliances between households contributes to the diachronic continuity of Zapotec societal structure wherein a household may be withdrawn or added to the village without any basic change in the community structure. Interpreted in terms of the alliance model, the disappearance or addition of a household affects only a few strands in the network that binds many households into one tight structure.⁴

In retrospect, I would like to express my frustration with the current ethnological status of the key concept in this report, social solidarity. I have done nothing more than indicate that inheritance is an element in a sequence of high frequency social exchanges between parents and children and, thereby, contributes to village solidarity. It is impossible to give precise measure to the importance of inheritance within the exchange network shown in Table 1. It is equally impossible to compare the precise contribution of this alliance network with that of other institutions which have been credited with contributing to village solidarity, e.g. the civil-religious-judicial hierarchy, *compradrazgo*, or

a multitude of regional factors external to village institutions. An urgent need exists for general, overarching models of social solidarity that compare the relative importance of different social behaviors.

NOTES

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²Taylor analyses the historical factors effecting this continuity, including a peaceful, bloodless Conquest; Spanish disinterest in the Valley; and the strength of community life at the time of Conquest.

³This final diagram represents an extremely simple model of the alliance structures which I feel is applicable to most Zapotec villages. Unfortunately, it fails to make allowances for other, less intense inter-household exchanges such as compadrazgo, guelagetza, and tequio. Elsewhere, Beals (1970) has discussed these inter-household exchanges using data I provided him for Diaz Ordaz. None appear frequent and intense enough to overshadow the importance of this alliance system.

⁴The only danger would come from a complete loss of exchanging households in either the first ascending or first descending generations. In this case, a household would be pressed to maintain its economic viability.

This latter situation is protected by an inheritance that is analogous to the extension rule in cross-cousin marriage, i.e. rule that redefines the referent. This rule states that a couple without descendents may form a "parent-child" like relationship that would allow the surrogate parents to trade their inheritace for super-annuity with another household.

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