

## RESEARCH NOTE

# Double-Surnames And Gender Equality : A Proposition And The Spanish Case\*

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## INTRODUCTION

"We've got to talk about this name deal."

— Hillary Rodham, speaking to Bill Clinton about changing her name to his before his 1982 campaign for Governor of Arkansas. (Bruck, 1994: 64)

Women have long seen their identities subsumed by family life; a woman's loss of her "maiden name" in marriage is a symbol of this self-effacement (Spender, 1980: 25). With a rise in their social and economic status, it is now somewhat more common for women in our culture to keep their own surnames. This means that more couples now must choose their children's last names.

Recent cartoons in The New Yorker explore this dilemma for a high income, highly educated audience. In one, a woman in evening dress is visibly pregnant. "Actually, the first name was easy," she tells her dinner companions. "It's her last name we're battling about." (September 11, 1995: 81). In another, a woman is trying to console her crestfallen suitor: "I do love you Ross, but I'm not ready to hyphenate yet." (March 25, 1994: 71)

A classified in the San Francisco Bay Guardian sought advice:

Help Us Name Our Baby! Dad has his last name, Mom has hers. What do we name the baby?

What did you do? His? Hers? Hyphen? Anagrams? Ideas, please. Write Baby...

This ad is reproduced in a book on the subject by Sharon Lebell (1988), Naming Ourselves, Naming Our Children. Lebell's advice is to give male children their father's name and female children their mother's. Many would object to siblings not having the

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same last name, but is a better compromise available?

The argument of this note is that there is. I first offer a simple logical proposition. This proposition proves that surnames meet certain desiderata of identity, egalitarianism, and feasibility if and only if they are double-names with a sex-based rule on which name gets dropped by future generations. I then examine some empirical evidence on these in the Spanish tradition of naming, descent, and gender relations. Actual descent systems and gender relations are of course not logically derived from any particular naming system, nor do they imply any. Thus does reality intrude on the simplicity of a formal model. If the model is useful, however, it will highlight certain regularities.

Kinship terms are important to anthropologists, but they have made little study of this two-name dilemma. This is odd, since many great anthropologists themselves bear hyphenated names: Evans-Pritchard, Levi-Strauss, Levy-Bruhl, Pitt-Rivers, Radcliffe-Brown, and Maybury-Lewis. No other academic tribe seems to have so many double names, even my own largely English tribe of economists. The English tradition of "double-barreled" names is usually explained by a maiden-name too important to be lost at marriage. In the US for example, many Kennedy descendants bear double surnames. What kind of system, however, would accord such an importance to everyone's name?

#### A PROPOSITION ON NAMING

Consider the following six desiderata of a naming system:

- (1) Identity: Everyone should keep the same surname throughout his or her life.
- (2) Parents: Children and parents should have a surname in common.
- (3) Siblings: Siblings should all bear the same surname.
- (4) Genealogy: A surname should provide some unambiguous genealogical reference; e.g., it tells us who is this girl's maternal grandmother.
- (5) Equal Continuity: Husband and wife should have equal chances of passing their surnames to future generations.
- (6) Feasibility: The number of names included in a surname should not grow with each generation.

If the above are accepted, it can be shown that there is only one general "solution": double-surnames in a fixed order, and with a sex-based rule on which name is dropped. To illustrate, say the ordering is (mother's name)-(father's name). Then the children of Mary Brown-Jones and John White-Smith could have the surname Brown-Smith, combining their mother's maternal and father's paternal surnames, while dropping the surnames of their mother's father and father's mother to maintain feasibility.

**Proposition:** Desiderata (1-6) are met if and only if.

- (i) Children keep a surname from both their mother and father,
- (ii) These names are always given in a fixed order, and
- (iii) Whether the mother's or father's surname is dropped by future generations is determined by their child's sex.

**Proof (If):** Giving children (i) both parents' surnames in (ii) a fixed order could meet (1-5), but not (6) feasibility. Adding a (iii) sex-based rule means the mother's surname will be dropped by boys and the father's by girls of some future generation, or vice-versa. Thus feasibility is met.

**(Only if):** Not using (i) both parental surnames for all children implies abandoning either (1), (2), or (3). Either a parent has changed his or her name, or else a child has not received both names. If a parent loses his or her surname, this violates (1) identify. If a parent keeps that surname but does not give it to the children, this contradicts (2) parents. Or if some children are named after one parent, and others after the other, this denies (3) siblings.

Using both surnames, but without (ii) a fixed ordering, contradicts (4) genealogy. A random or history-dependent rule for which name is dropped can meet (5) equal continuity and (6) feasibility. But only (iii) a sex-based rule can distinguish the father's from the mother's line, and thus meet (4) genealogy.

**Q.E.D.**

A logical proposition is either correct or it is not. It cannot be "disproved" by real-world data, unless one finds a clear counter-example. Its logical validity, furthermore, does not mean that it answers all possible naming dilemmas — for example, those arising from same-sex marriages or past lineages.<sup>1</sup> If its formalization is useful, however, it can serve as a fixed point to compare the structures of real family systems. No traditional system of which I am aware meets all these desiderata:

- The traditional Anglo-American system violates both (1) identify and (5) equal continuity.
- As noted, Lebell (1988) proposes that sons bear just their father's surname and daughters just their mother's. Children could also be named for their opposite-sex parent, as in "braided" lineages of the New Guinean Mundugamor (Mead, 1971). The system proposed here merely pushes Lebell's idea forward by one generation, so that the desiderata of (2) parents and (3) siblings can be met.

<sup>1</sup> The proposed system does not treat previous male and female lineages equally, since the mother's surname must have come from a male ancestor. But without knowing the "original" female surname, we must either fall back on a male name or create new names altogether. The system can be played out forward, but not backward. So much for a foolish consistency.

- Equal continuity (5) might be interpreted as an equal chance of each name reappearing eventually, but not necessarily in the same generation. To meet (4) genealogy, such "generation skipping" requires names alternating in a multi-generation cycle, as used by the Koreans (Alford, 1987: 54-57), who are in fact patrilineal. Such skipping would violate (2) parents, however.
- Any time-consistent system must meet (6) feasibility. Some aristocratic traditions like the Spanish may carry  $2^N$  surnames out to  $N = 3$  or 4 generations.<sup>2</sup>
- The traditional Spanish and Portuguese systems preserve all desiderata except (5) equal continuity, a woman's father's name being dropped by her grandchildren of either sex.

A naming system can neither fully determine social values, nor be determined by them. Goody (1990: 364-365) notes that Iberian or Arab women who retain their natal surnames in marriage are not thereby assured more autonomy than women in the Anglo-American tradition. One must look at the whole culture, not just systems of naming or even descent. Naming is of course not equivalent to descent. And as long recognized in the study of matriliney, even when property does descend through the female line, this does not mean females necessarily control that property (Schneider and Gough, 1961; Fox, 1967).

But one can still question whether a naming system tends to reinforce certain values. Some cultures, for example, take even further the self-effacement implied by a woman giving up her surname.

The Korean tradition is for a woman to lose not just her surname but even her given name upon marriage, becoming simply "the wife of X." The Australian Arandas usually tell boys their "hidden" names in an initiation in late adolescence; girls never learn their hidden names (Alford: 56-57). It is difficult not to interpret such practices as imputing a lower status to women. Indeed, all moveable property in Korean and Aranda society is inherited by males (White, 1992: Variable 75).

There is little in the way of cross-cultural study of naming systems *per-se*. One major study is by Alford (1987). This is based on the 60-society anthropological sample of the Human Relations Area Files (HRAF), which Alford coded for naming practices. Alford's work is useful, but has little to say on female descent, or the social values of interest here. I know of no other large data sets coded for naming practices.<sup>3</sup>

## THE IBERIAN APPROXIMATION

The Iberian naming system achieves most of our desiderata. Traditional Spanish and

<sup>2</sup> Note that the  $N$  generations to which desideratum (3) Genealogy can be applied is limited only by convenience or modesty. If  $N=2$  we could bear the names of our Mother's Mother, Mother's Father, Father's Mother, and Father's Father (MoMo-MoFa-FaMo-FaFa). Double-names already face the hurdle of seeming pretentious, however, so such an extension is unlikely.

<sup>3</sup> The HRAF archive of primary materials on sexuality and marriage, now on CD (Human Relations Area Files, 1989), could be coded, but that is not undertaken here. The Murdock-White Ethnographic Atlas, (White, 1992), and the Standard Cross-Cultural Sample (Stark, 1987) should also be mentioned. These contain several codes on gender relations, but nothing on naming systems *per-se*.

Portuguese systems of dual naming do not treat both lines equally, since only the names of both grandfathers are passed on to children. But all desiderata except for (5) equal continuity are met, and in particular, (1) personal identify. I will briefly examine the case of Spain.

It is now common for Spanish and Latina women to take their husband's last name, but this stem from an older tradition which merely added that name with de to the woman's own name. The former President of Nicaragua, for example, is usually called "Violetta Chamorro," after her late husband, Pedro Chamorro Cardenal. But on formal occasions she would be addressed as "Violetta Barrios Torre de Chamorro." The first two surnames, the paternal followed by the maternal, have been hers since birth.

Spain has had, I claim, a relatively high degree of :

- 1) equal inheritance through the male and female line;
- 2) female succession in a lineage if male heirs are lacking;
- 3) considerable independence for some women;
- 4) social groupings maintained by endogamy; and
- 5) hyper-articulation of relatedness and nobility.

The last two points are not obviously related to the other three. I will argue, however, that they are a consequence of the first three, and that all five imply a relatively high status for Spanish women. I will now briefly sketch the evidence for these points:

1) Equitable inheritance through the male and female line has been the norm since medieval times. "Hispano-Christian law in all regions held that marriage constituted a society of equal rights, based on half-and-half sharing and equal division of property among families and heirs." (Payne, 1973: 45) Equal treatment of heirs is also shown by:

a) drawing lots to encourage a fair division: Sons and daughters first reach a consensus on how their parents' estate is to be divided, and only then draw lots on who gets which share. If heirs are risk-averse, then this device ensures that shares are made as near equal as is possible. Voluntary trades are still possible after the lottery. This is still common in Spain (Brandes, 1975: 121-122).

b) the legal tradition of the *legitimo* part of the inheritance. This is the minimum which must be divided equally among one's surviving children — today one-third (J. and M. Corbin, 1984: 62).

2) Female successions in a lineage. Most European monarchies have had recourse to the maternal line when male heirs were lacking, but few have used this principle (or had it used against them) so regularly as the Spanish. Strategic successions that relied upon the maternal line were: the marriage of Ferdinand and Isabella (1469) uniting Aragon and Castile; Charles V's bringing Spain into the Holy Roman Empire (1519) by virtue of his maternal grandfather; Louis the XIV, who claimed the Spanish Netherlands for France (1667) through his Spanish wife, and Spain itself (1701) through their grandson; and finally, queen Isabella II (1833).

All these were violently contested (Payne, 1973). Succession through the maternal line continues to be controversial. There are still "Carlists" who deny the legitimacy of the present king, Juan Carlos I, great-great grandson of Isabella II. This raises the question of how female succession could have existed for centuries, and still be "controversial." We will encounter several such tensions.

3) Female independence. Foreign travellers to 17th Century Spain "were almost unanimous in their denunciation of the bold and often provocative behavior of Spanish women," according to social historian Marcelin Defourmeaux (1966:146). He notes, however, that these sojourners to the town square could not view the tyrannized domesticity of many women. A better-informed French traveller of the time, Antoine de Brunel, tried to resolve this paradox of public liberty and private bondage. The excessive demands of Spanish women forced their husbands to keep them in virtual slavery, he claimed, "fearing that reasonable freedom would emancipate them from all the rules of modesty" (Brunel, 1655; quoted in Defourmeaux: 147).

This traditional masculine view anticipates arguments of anthropologists such as Germaine Tillion. Her highly-influential Republic of Cousins: Women's Oppression in Mediterranean Society (1983) argues that, paradoxically, the very strength of female inheritance in these societies means that if men are to control that inheritance, they must control the sexuality of their sisters and daughters. Only thus can they force them to marry within the patrilineal clan. The veil, claims Tillion, is the flag of female inheritance in the Arab world(1983:30-31). Tillion interprets obligatory head-scarfs in much of the northern Mediterranean as a partial veiling of women. This has also been traditional in Spain, and endogamy is still quite common, as we shall see.

4) Social groupings maintained by endogamy. Tillion has emphasized endogamy as the Mediterranean norm, and she is largely supported by Goody (1983: 34-82). Two of the great dynastic unions mentioned above were marriages between first-cousins: Ferdinand of Aragon with Isabella of Castile, and Louis XIV of France with Marie-Thérèse of Spain.

Endogamous strategies have been equally important, if more complicated, within the broader social networks of petty nobility (Moreno Almarcegui, 1992), rural landowners (Comas d'Argemir, 1992; Bestard Camps, 1992), and industrial bourgeoisie (McDonogh, 1986).

Even at the village level, endogamy is still remarkably strong in contemporary Spain. In the Sierra village of Becedas, with less than 1,000 inhabitants: 82% of all married couples had both been born and raised in that village (Brandes, 1975: 164). While this degree of "close marriage" is not unique to Spain, the status of Spanish women may be relatively higher, that is to say, more voluntary in marriage, than in the endogamous Southern and Eastern Mediterranean. The resulting tension between close marriage and female independence has allowed Spanish women to "stretch" the bounds of endogamy, extending the idea of relatedness and nobility to an almost absurd degree. This is argued in the next point.

5) Hyper-articulation of relatedness. By the time of Cervantes the Spanish had the

reputation of having more nobles, and a more impoverished nobility, than any West European country (Defourneaux, 1966: 40-45; Moreno Almarcegui, 1992). In the 17th century 10 percent of the Spanish population, and the entire population in some regions claimed noble status, including many who were landless (Payne, 1973: 298, 376). The word for the lowest degrees of Spanish nobility registers this with some irony: *hidalgo* is a contraction of *hijo de algo* ("a son of a something").

This excess of nobility is clearly linked to excessively divided estates. The ideal of equal inheritance must be balanced against a wish to maintain estates undivided. "Equalization" was often interpreted to mean just the obligation of the elder *heredero*, the one who actually got to keep the land, to support those with an "equal" right. This perpetual dependency is widely resented (Corbin and Corbin, 1984: 56-64), and is recognized in the term for petty aristocracy: *los infanzones* ("the large babies"). The long multi-surnames of Spanish nobility record the entitlement to such dependency. This multiplication of surnames only increases the number of possible heirs, and of course, disagreements.

Hypertrophic relatedness is a strategic alternative to endogamy: both are responses to equality of female inheritance. These are two basic kinship strategies for the control of wealth, the "close" and the "far"—keeping marriage within the extended family, or extending the family still further.

These two strategies are not mutually exclusive, however, and should be properly balanced. As Joan Bestard Camps (1992: 146) explains in the insightful essay, "*La Estrechez del Lugar*" ("The Closeness of the Place"), any "matrimonial field" defines an ideal match that is "*ni demasiado cercano ni demasiado alejado*" ("neither too close nor too far"). This is precisely analogous to the twin goals of optimal financial management, where the greater control of a more closely-held portfolio must be balanced against the lessened risks of further diversification.

The "far" strategy of familial expansion, however, with its complex networks of cooperation, may be more problematic than the "close" strategy of limited endogamy. Indeed, the decline of the Spanish aristocracy is often linked to an almost manic overextension of *hidaiguia* (Defourneaux, 1966: 40-45; Payne, 1973: 298-300, 373-376). If the marriages of Spanish women had been more easily controlled, this aristocratic euthanasia might have been avoided.

## SUMMARY AND CONCLUSIONS

This paper begins by showing that double-naming can treat both sexes equally, and still achieve other properties that may seem mutually incompatible. It then considers Spanish naming as an approximation to this schema, and finds some evidence that the maintenance of female surnames may be connected to equal inheritance and a relatively high female status. Obviously, this evidence is only suggestive.

Throughout North-America and Western Europe, a wide variety of surname compromises are now on display in real family lives. The double-surname system advocated here will not

be adopted because of a logical proof, nor can the adoption of such a system secure the victory of cultural norms. Norms emerge rather from the decomposition of older norms, from millions of more-or-less unhappy compromises of people trying to "have it both ways," to bend old standards without breaking them.

This paper's proposition on double-names shows only that certain egalitarian principles are not logically incompatible. That they may not be practically impossible is suggested by Spanish women's autonomy, and the decomposition of noble lineages in that country. If we are moving toward a new way of naming our families, then double- surnames may be an attractive compromise.

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