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Majorate conglomerates in Spain and lineage structure

The *Leyes de Toro* (1505) are often considered to mark a turning point in the history of Castilian majorates, which has long been the subject of comment. From this date onwards, with a few rare exceptions, it is generally stated that all the majorates founded were based on strict primogeniture, with systematic priority given to male descendants. As the number of majorates multiplied during the early modern period, this model has become a *topos* in historiography (Pérez García 2021). The majorate, while not reserved for the aristocracy, was seen as a necessary step in the upward social mobility (Girón Pascual 2010), as an element of prestige for all urban oligarchies (Franco et Ramón 1998; Cartaya Baños 2018) and as one of the clearest signs, along with patronage, of belonging to the nobility (Dedieu 1998). Its proliferation, including in very small majorates, has been studied well beyond the aristocracy and in very different areas of the Hispanic monarchy, beyond Castile (José Manuel Damião Soares Rodrigues 2015; José Manuel Damião Soares Rodrigues 2007; de Lurdes Rosa 1996; Garayoa 2009). It is deemed the preferred instrument for establishing primogeniture within the nobility, since the division of property in Castilian law was mostly egalitarian. However, the oldest and most powerful families still had majorates, sometimes several, some of them founded in the second half of the fifteenth century - a period of intense renewal of the noble elites - whose conditions of succession varied. Some of these majorates served purposes other than the perpetuation of a single, uniformly and allegedly patrilineal lineage. They could be reserved for cadets or daughters, or made subtler choices that shifted the logic of primogeniture, which was much less crucial in the context of the 15th century than it was in the 17th. Even beyond these particularities, which became rarer from the 16th century onwards, the accumulation of majorates within the same family does not really fit in the traditional historiography which usually studies the majorate in its generality or through case studies that focus on a single majorate in a single family. Majorates for cadets - in other terms secondary majorates - require a lineage-wide approach. While many classic studies of the largest households have taken into account the jurisdictional, administrative and economic aspects of the accumulation of seigneuries, few pieces of scholarship have focused specifically on majorates assembled in conglomerates, with the notable exception of Juan Ramón Palencia Herrejón's study of the ducal house of Maqueda (Palencia 2002).

The aim of this contribution is to observe how majorates interplayed within families or between families, in order to re-examine questions relating to the forms of the noble family and

in particular to the notions of 'lineage' and 'household'. Our examples will be taken from the Zúñiga and Sotomayor families, two "lineages" allied from the 1520s onwards, but whose most important majorates date back to the end of the 14th century, in the case of the oldest lineage, which continued to found new majorates in the 17th century (Gerbet 1979; Vega 2008; Ruibal Rodríguez 1993; Cabrera Muñoz 1977; Lop Otín 1993; Lora Serrano 1987; Paredes 1903; Ladero Quesada 1977; 1998; Saus 1988; Maria Vicens Hualde 2018; Zurita Chacón 2015; Herrera García 1986; María Vicens Hualde 2017; Roulet 2018; 2021; Herrera García 1990). Five majorates, those of Béjar, Belalcázar, Ayamonte, Villamanrique and Valero, which were passed down within the family or circulated in its periphery, will be analysed. The first of these is the most prestigious, dating back to 1397 and enshrining primogeniture from a very early date. The second, dated 1484, is a majorate of cadets shared between two lineages. The third, which came from the Sotomayor family and was founded in 1453, has more specific rules which also favour the cadet. The fourth, which is more recent, was founded in 1575 and relies on primogeniture and agnation, designed to support a third line in the lineage. The last one, the Valero majorate, was founded in the 1630s with a similar ambition. We will map out their circulation, uses and articulation within the family patrimony. Since the passing of each majorates from one generation and one line to the other can be hard to follow, each description is backed up by (simplified) genealogical diagrams.

Majorates and the confrontation between "lineage" and "household": a critical overview of historiography.

This contribution proposes to take these specific features of the largest families as a starting point in order to show that majorates may have been the instruments, then the causes and the framework for the perpetuation of a lineage logic that encompasses the strategies of households. In the largest families, the seniority of the majorates and the accumulation on the same head of very diverse majorates over time, each one bearing rights and conditions on the name, the coat of arms or the impossibility of their aggregation, make it possible to argue for the fairly enduring persistence of a form of lineage solidarity, despite the very strong conflicts within the lineages for the control of all these *vínculos* (Melero Muñoz 2021). The cases I am going to discuss provide an opportunity to revive some of the research carried out in the first half of the 2010s, in particular by J.H. Franco (Hernández Franco et Rodríguez Pérez 2014; Franco et Puche 2010), on the relationship between the logics of 'lineage' and 'household' in

noble families, based primarily on case studies of the Marquisates of Vélez and Villena. These articles have done the most to revitalise studies of noble kinship, drawing on anthropological categories before later shifting towards cultural history. They rekindled a debate that had been going on in European historiography since at least Lawrence Stone, around the link between the emergence of the 'State', the decline of 'kinship' and the strengthening of 'households', which were very early on studied for their own sake and more often than not as an alternative to lineage (Atienza Hernández 1987; Cunha 2000; E. Haddad 2009; Salas Almela 2008; Terrasa Lozano 2012; Quintanilla Raso 1979; Devís 1999), making it possible to compare the French, English, Portuguese and Spanish trajectories of the European aristocracy.

What are their conclusions? As the generations passed, the logic of the lineage, ever larger and ever wider, withered away and the authority of the *pariente mayor* lost much of its significance and power. The lineage tended to be transformed into different, even competing, "households", each associated with a particular majorate based on strict primogeniture. As a result, kinship shrank to the closest relatives and the household became the structuring family framework. It virtually became equivalent to the nuclear family, but dependent on a set of symbolic and material assets, as well as rights, united in the majorate. This is the most convincing line of force in this scholarship, which should have fuelled an even broader debate on the European kinship system (Delille 2007; 2000; 2001; E. Haddad 2012), on the rise of a patrilineal logic, on the agnatic emphasis within lineages, on the reduction in the number of heirs in a single line, and on the weakening, if not disappearance, of solidarity between the lines of a single 'lineage'. The rise in the cost of dowries and the over-indebtedness of noble families largely explains this tightening on close kinship, also characterised by marriages very close to the main trunk, with degrees of consanguinity that are probably greater in the Iberian nobility than elsewhere. Juan Hernández Franco, faithful to a long Spanish tradition of discussing the legacy of Laslett and the Cambridge school – hence the emphasis on the rise of the “nuclear” family (Devís 1999) -, also links these changes to a very early form of "lineage individualism" and, he contends, to the emergence of "blood" ties, and even of an interest into the "transmission of genes", in opposition to "collective kinship", referring to the supposedly more distant kinship of the "lineage".

It may be necessary to distance ourselves from such psychological and culturalist interpretation of family reunification, hypotheses that are of interest but rather difficult to demonstrate as they stand, especially as the "rise of individualism" is an enduring teleological narrative hard to demystify. This shifting from kinship to households is primarily the result of

social, economic and political factors specific to the politics of majorate managing, and there appears to be no point in resorting to a change in attitude towards one's family or offspring to comprehend these transformations. On the contrary, the majorates themselves did lead to a tightening of family ties, which may have had an impact on the nobles' idea of solidarity within the family. Yet the model remains convincing and is applicable to many families. This article will attempt to explore the issue in greater depth with a new case study, arguing for a more nuanced, less systematic transition from one model to the other. For several generations, these two categories of analysis – lineage and household - were able to adjust to each other, although scholarship tends to see the majorate as an instrument for marginalising the lineage in favour of the “household”, since it was first and foremost characterised by the exclusion of the elders. It is by observing the clauses of the majorates and their transmission that these adjustments between the two models become conspicuous and their opposition less clear-cut.

To appreciate this situation, we first need to clarify the definitional issues surrounding each of these terms, since the popularity and growing association of these two terms from the early modern period ("*de mi casa y linaje*") - to the extent that *casa* replaced *linaje* among some genealogists and in many treatises on nobility - is one of the arguments in favour of replacing the latter with the former. According to Covarrubias (1611), *linaje* is "the offspring of houses and families", who, ideally, carry his name. This definition reflects both the desire, from the Middle Ages onwards, to claim a mythical ancestor, in the largest families, and the need, for reasons of memory, heritage and religion, increasingly after the 15th century, to refer to a more concrete founding ancestor, i.e. the founder of the majorate. In a sense, this *emic* definition of *linaje* - the set of descendants of an individual, set up as the founder of the lineage, who bear his name – looks like the *etic* definition of the descent group given by anthropologists, but the historiographical uses of the term differ and refer, behind the word lineage, to realities of very variable sizes. Within the European kinship system, which is cognatic, lineage cannot refer to a “descent group” in the strictest sense. The shifting from the “lineage” to the “household” is all the more striking when we assume a broad definition of the lineage, fairly close to how it was used by the actors of the time: people who shared a name - in our case, Zúñiga - and were subjected to the distant authority of a *pariente mayor*. The Zúñigas, who theoretically came from a small town in Navarra but settled in Galicia, Andalusia and Chile, with very disparate social situations within and outside the nobility, numbered hundreds of people in early modern times, the majority of whom were remote from the main households of the lineage - the Duchy of Béjar, the County of Miranda, for example - and were not subjected to any kind of lineage

discipline whatsoever. In this respect, the defence of each individual household within the lineage is essential, and very early on. However, once we take on board the tightening of kinship analysed by the historiography and scrutinise the choices made by these noble households, the transition from lineage to household is far from being this clear-cut. The persistence of patrimonial and matrimonial policies that take into account the preservation of different cadet branches in addition to the eldest branch or the interplay of alliance and transmission between several households descending from the same ancestor point to the underlying persistence of lineage solidarity.

However, in the case of the Fajardo family studied by Franco and Rodríguez Pérez, the trajectory of the transformation into households is very neat, as they split into two lines, which began to develop independently and were no longer tied after the 1630s (Hernández Franco et Rodríguez Pérez 2014). It is undoubtedly difficult to state that this example constitutes the norm and that cases to the contrary are exceptional, but it is certain that they are far from isolated. Still, in other cases, such as the Álvarez de Toledo family, this split only endured until the eighteenth century when the different households reunited. This resulted from a deliberate policy that seems to point, underhandedly, towards the loose maintenance of lineage (Hernández Franco et Precioso Izquierdo 2020). As long as there was inter-generational solidarity between several lines of the same family, it can be argued that lineage-based logic persisted, despite the conflictuality surrounding succession, and even if these younger branches were at the service of the elder one. In cases other than the Fajardos, from families whose conglomerate of majorates were more ancient, the trajectory is different and seems almost contradictory. On the one hand, we observe the reduction in the number of children to a single heir and the tightening of family policies on the transmission of households, each following its own policy, and, at the same time, lineage solidarities endured through the majorates transmitted in the cadet lines. In other words, there is not necessarily a contradiction between the persistence of lineage and the blossoming of households. Our models are most often built with families with a single majorate in mind, but when numerous majorates circulated between the lines of the grand families, they were the architects of both the preservation of lineage solidarities and that of particular households - with their own territorial base and, more often than not, their own pantheon, in a conventual and, more rarely, parish chapel. This raises the question of their organisation: what was the structuring element? What determined what? Is it possible to highlight lineage logics without implying that they were strongly structuring? The interplay of majorates is a good indicator of these issues, and this article aims to give a few

examples, bearing in mind that these questions remain tricky because the lineage was both the framework and the instrument of household politics.

At last, the majorates also provide an opportunity to question the emic and etic uses of the term household. The emic meaning of the term is particularly abundant, but is congruent with its etic one. The *casa* may refer to the *casa solar*, the original dwelling of a lineage, which is a particular place linking the living to their ancestors through the land, as well as to all the family members to the head of the family living under his roof, beyond the circle of close relatives, up to and including the *criados* - ie. much more than the 'nuclear' family. From the *etic* point of view, the household designates a form of legal entity - the term is anachronistic - defined by the fact of holding and passing on property, a set of symbols, coat of arms, a name, which organises the lines of succession and the defence of which takes precedence over everything else. Majorates were the props of households. While this definition seems very close to the anthropological concept of the household, heir to a long tradition (É. Haddad 2014), the 'household system' of the European nobility had, as Godelier pointed out (Godelier 2014), a much more restricted social extent than the most canonical examples in anthropology, such as the Kwakiutl, since in early modern Europe, brothers could belong to different households if there were several majorates within the family. The resort to anthropology also raises the question of the social and emotional extent of the household, which is to be found differently in the historiography. For a long time, scholarship has tried to overcome a narrowly legal and patrimonial approach to the majorate, which was a form of projection of critical conceptions dating from the end of the eighteenth century and the nineteenth century, reducing the majorate to mortmain property, considered an obstacle to economic development (Abreu 2001; Clavero 1974). The majorate was indeed inextricably linked to a legal system that conferred rights (seigniorial, feudal), but also protected symbolic assets (name, coat of arms, palace, etc.) that constituted the identity of the 'household'. It guaranteed both the relationship with the ancestors and a set of family practices and traditions making it the instrument for crystallising the family itself, the way in which it took shape, was disciplined and institutionalised, right down to its 'family spirit', its 'family customs', as a category 'actualised' in the minds of its members. It was a family law and practice far more than a legal and economic instrument. In this sense, the majorate was the heart of the noble household in its broadest sense. More than a term describing the functioning of noble kinship, it was - as well as the lineage -, a performative watch word and a normative instrument whose very purpose was to formalise and discipline family practices by influencing matrimonial and marital choices, thus strengthening the power of heads of family

by endeavouring to make this “desired kinship” correspond to an actual one (Bourdieu 1972). Without calling this into question, the attention paid to conglomerates of majorates and majorates of cadets invites us to investigate what became of these disciplinarian, symbolic, cultural and even affective dimensions when the accumulation of several majorates in a family led to their juxtaposition and when some of them, inherited or relics of previous generations, no longer corresponded to any 'household' and were therefore stripped bare to their legal dimension.

The end of a household: the Sotomayor's false cadet majorate

This is the case of a majorate from the Sotomayor family, which creates a particular tension between the lineage's older and younger branches and illustrates the very common situation of a majorate that eventually finds itself without a household. It dates back to 1453 and brings together the domains (*señoríos*) granted by Juan II to the Grand Master of Alcantara, Gutierre de Sotomayor, who founded two majorates for his two sons, in the idea that they should develop separately: the county of Belálcazar and the viscounty of La Puebla de Alcocer went jointly to the elder branch, and Alconchel to the younger son¹. The former is characterised by a particular clause that had far-reaching consequences and privileged the second-born. Even though it seemed to emphasise primogeniture, it commended that, at the time of the holder's death, a living second son should succeed to the detriment of his nephew born from the dead first son. This nurtured the hopes of the cadets, whose expectations to succeed in their fathers' estates was greater than in a traditional majorate, built upon a stricter primogeniture. This clause shaped the very strong bond that the household forged with religious vocations, not strategically or cynically, but as a very specific family culture in which the elders paradoxically entered the convent. This solution to the internal tension built from the majorate between first and second sons was not set in stone: it did not arise mechanically, it was also the result of circumstances, but it was reproduced, with variations, over the generations. In the first generation, the first son inherited. In the next one, the eldest, a religious and then founder of a Franciscan province that had been placed under the close patronage of the family, left the patrimonial estates to his younger brother, before becoming, after the latter's premature death, one of the protectors of the county entrusted to the sole heir, his nephew Alfonso (Beceiro Pita 2014; Roulet 2021). This Alfonso had four sons and a daughter, the first of whom died prematurely. In 1517, he

¹ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 325, exp. 15. Testament of Gutierre, 1453.

began negotiations to marry his eldest surviving son, Alonso Francisco, to Teresa de Zúñiga, a potential heir to the Duke of Béjar's majorates. Alonso Francisco was still under threat from his two younger brothers, who, if he were to die before his father and leave a child, would take precedence over his sons in the succession. The father's strategy for protecting his eldest son is entirely in accordance with the family spirit: during his lifetime, he renounced his estates to become a Franciscan in a convent run by the family, as his uncle once did, thus hastening the timing of his own succession, since his entry into the convent meant his civil death². Alonso Francisco succeeded him immediately, while he was still alive, and after a few years the younger brothers gave up the possibility of inheriting one day: first the third son, who also became a religious, and then the second son³, harder to convince since he was closer in the succession line, who negotiated a position for a natural child before also becoming a Franciscan, after spending his life as a soldier in the entourage of the emperor. The convent saved the family property from being passed on, albeit in a different way to previous generations, forcing the cadet to support the preeminence of the first-born son. Beyond the majorate, this capitalisation on the eldest reached the so-called free properties (*bienes libres*) of the succession, since the younger children, in their successive wills – and following their fathers' command - left their share to the eldest when they embraced religious life⁴.

The Sotomayors had built their uniqueness on this osmosis between convent and majorate. As soon as they joined forces with the Zúñiga, whose majorates were older, more powerful and also more prestigious, the system jammed up significantly. The clauses of the marriage of Alonso Francisco de Sotomayor and Teresa de Zúñiga, which have long been commented on (Gerbet 1979; Nassiet 1995), gave way to the formation of a conglomerate of powerful seigneuries, complementary in geographical terms. Yet they did not merge and were transmitted through discordant rules. When Alonso Francisco died in 1544, his eldest son bore both names and became Count of Belalcázar. He did not become Duke of Béjar until the death of his mother, who held the title, more than 20 years later, in 1565. The Sotomayor family culture had been passed on to him, and support for the Franciscans was still strong during his lifetime. On his death, however, his son, who was the first to inherit both titles at the same time, was more inclined towards the Zúñiga tradition. Was the county of Belalcázar still a "household" at that time? It was built around a majorate, which certainly implied rights over

² Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 326, exp. 39.

³ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 326, exp. 60. Also see Andrés de Guadalupe, *Historia de la Santa Provincia de los Ángeles*, Madrid, Mateo Fernández, 1662, p. 301.

⁴ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 326, exp. 45 (his daughter Felipa)

men and land, and very powerful patronage over a network of clients, servants and so on. But it was no longer a "household", in the sense that it was no longer held exclusively for itself: the palace was no longer inhabited, the seigniorship was governed by a *corregidor*, support for the Franciscans waned without the patronage disappearing, etc. In a way, it became a weak majorate, if we can make this distinction, or even a dead majorate, as we speak of a dead language, reduced to its economic and legal dimension, transmitting rights and property yet stripped of its family, emotional and symbolic dimensions, in short of its capacity to formalise family relationships. When two majorates are combined, only one household remains in the full sense of the term. There is, however, a downside to this logic: the eldest children of the Duke of Béjar got into the habit of bearing the title of Count of Belalcázar, and then that of Marquis of Gibráléon after their marriage, so that the titles were occasionally reactivated and made temporarily more autonomous. Thanks to this policy, there was a "household" of Gibráléon - with its palace, its servants and its income - for several decades, but also with a title that was the antechamber to another, which was non-transferable and which, for some, who died before their father, who remained a Duke, was only the title of a lifetime, before the House of Gibráléon returned to the family patrimony.

During this transitional period, the specific nature of the majorate that governed the transmission of the Sotomayor seigneuries kept on weighting on the relationship between elders and cadets, as the discrepancy between the majorates of Béjar and Belalcázar became a source of tension. The eldest son was bred to succeed and expected to become a duke of Béjar, but his position in relation to the County of Belalcázar was weaker, as his future offspring remained under threat from his younger brothers. The situation was harmonised with difficulty at the beginning of the 17th century. The 5th Duke, Francisco Diego de Zúñiga y Sotomayor (†1601), tried to impose the traditional solution on his firstborn in the hope to prevent a dramatic separation of the two majorates: he placed him in a Dominican convent - most likely against his will -, an order that was under the Duke's protection in Andalusia, so that the younger one could inherit both the Duchy of Béjar and the County of Belalcazar⁵. Judging by the very secular life of this brother Francisco de la Cruz⁶ and, even more so, by the younger brother's fear when he inherited his father's titles, it is certain that this situation was by no means accepted. The new Duke's letters to his Roman procurator in anticipation of his elder brother's eventual renunciation of his religious vows and his ultimately successful attempts to merge the two

⁵ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 228, exp. 58

⁶ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 389, exp. 93. The reference was found in (Mira Toscano, 2014)

majorates in the beginning of the 17th Century clearly show that the system was unsustainable⁷. The Sotomayor majorate, now anachronistic and overly original, depended on a whole family system and a form of reverence for the choices made by the founding generations in the late 15th Century. Had the marriage between the two lines been later, the Sotomayor majorate could perhaps have become a cadet majorate, by virtue of a pragmatic rule of 1534, which has been discussed for long, requiring that in the event of two majorates being united by marriage and exceeding two million maravedis in rent, one of the two should pass to the cadet, with the argument of preserving the honour of the founders (Clavero 1974; Dedieu 1998). The choice to merge the two majorates proves *a contrario* that although the convent housing the Sotomayor pantheon continued to be one of the many patronages of the lineage, the cult of these ancestors has undoubtedly waned, without their memory - which implied rights - disappearing. The growing popularity in the 16th century of the phrase "su casa, estados y mayorazgos", in the plural rather than just the singular, is a clear indication of this transformation: many majorates were now simply parts of patrimonial conglomerates without being the support of a real household. Under these conditions, it is hard to argue that the county of Belalcázar was still a household. After the fusion, no eldest member of the Zúñiga and Sotomayor lineage entered any religious order whatsoever.

The younger branches of the Zúñigas: a long-lasting lineage policy

The solution of moving this majorate to a younger branch would undoubtedly have been a delicate one, as the lineage already maintained its younger branches with other majorates.

At first glance, however, the case of the Zúñiga family might seem to provide an early illustration of the process of transforming lineages into "households". In the 15th century, Diego López de Zúñiga (†1417), the most illustrious member of the Zúñiga family in the broadest sense of the term, had accumulated a number of widely scattered seigneuries, which he divided among his children in his will, just as Gutierre de Sotomayor would a few decades later. Although, strictly speaking, these were not always majorates but *vínculos*, the intention to found several branches, while entrusting the most prestigious to the eldest, is quite clear. In the successive wills he left, each son received a share of the estate⁸. The eldest one, Pedro (†1453),

⁷ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 329, exp. 3 and leg. 233 exp. 133.

⁸ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 124, exp. 21 (testament, 1401), leg. 214, exp. 130 (codicillo 1397), leg. 213, exp. 65 (testament, 1397), ecaja. 214, exp. 60 (testament, 1407), leg. 214, exp 26 (testament, 1410). We follow the last one.

received Béjar, Burguillos and Capilla - which had been associated in a single majorate since 1397 -, properties in the Douro and along the Esgueva, near Valladolid, as well as Curiel, Encinas, Esquera, Traspinedo and Villaconancio in the same region, and also rights to the tercias of Peñafiel and properties around Palencia, in Extremadura. The Mariscal of Castile Sancho (†1450) received seigneuries in the provinces of Logroño and Alava (Verantevilla, Grañon and Bañares). The third son, Iñigo (†1420), inherited in Navarre and La Rioja (Estuñiga, Mendavia, Clavijo, Huércanos y Bovadilla, etc.). The fourth, Diego, received Hacinas and its castle, Quintanilla, Moradillo and inheritances in the Burgos region. Finally, the last son, Gonzalo, bishop of Palencia and Jaén, received Bodón and Urbal, around Salamanca. Although there is of course nothing egalitarian about this division per se, it is more indicative of a desire to strengthen solidarity between these legacies, which are sometimes close to each other, rather than concentrating everything on one strong line. In the event of the defection of one line, the other branches were meant to inherit its patrimony, with priority given to the eldest. This was the case for Iñigo's and Sancho's descendants after two generations.

The sharing of its properties, seigneuries and majorates carried out by Diego López de Zúñiga follow a logic that may appear to be based on lineage. It encouraged coordination between the lines and organised their solidarity over time. The children of Pedro de Zúñiga (†1453), the eldest son, shared their father's inheritance in a way that seems to conform to the grandfather's model⁹. The eldest, Alvaro I (†1488), inherited the rights to Béjar, which was raised to the rank of dukedom during his lifetime, while the younger son, Diego López (†1479) bred the counts of Miranda del Castañar. Afterwards, each of these two branches pursued an independent policy: neither failed for several decades, so that the two households became autonomous. From the 1520s onwards, both houses were counted among the *grandes* and had no matrimonial or patrimonial ties. It seemed unthinkable for either of them that their patrimony would circulate from one to the other. Each developed a policy of alliances with other families outside the Zúñiga lineage. When the eldest branch failed, in the person of Álvaro II, who married without a legitimate heir, the ducal household did not pass to the original cadet branch but circulated through a woman, Teresa, a descendant of a closer cadet line.

Is this estrangement between the two branches, from the second generation onwards, symptomatic of the shift "from lineage to household" diagnosed by historiography? Generations after the division that is considered original (on what criteria, when each generation establishes new majorates?), the initial elder and younger branches are indeed too far apart not to be fully

⁹ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 380, exp. 16 and 18 (testaments, 1450 and 1453).

autonomous households. But this is less a matter of choice or orientation in family models than the mere consequence of the passage of generations. Two criteria seem more relevant, as used by J. H. Franco: the refusal (or impossibility, which does not amount to the same thing) to found younger branches and the fact that illegitimate children are preferred to younger branches when the elder branch fails. As far as illegitimate children are concerned, the succession of Álvaro II could have been a test, but it is precisely a younger branch that succeeds in the estates of the elder branch, shifting its own majorate to a third branch. Not only did this interplay between the different branches of the lineage remained crucial, but the main line did kept on founding cadet lines, at least until the mid-17th Century, a policy often considered as a key element of the broad kinship system ("clannish" in some articles) of the late medieval period, to which the narrow, more vertical logic of the "households" would have given way. After Pedro, it was Álvaro I who shared the family estates, giving the seignury of Mirabel to his third son and leaving Traspinedo and Villoria to the youngest one¹⁰. In the following generation, these last seigneuries were reverted to the eldest line¹¹ and a majorate was created for a younger son, Ayamonte, and others followed, as we shall see. The reduction in the number of heirs only came later, at the end of the 16th century, on an *ad hoc* basis and in a catastrophic financial situation (Jago 1982), and it did not invalidate the interplay between the different branches. On the contrary, it stimulated their relationship, not without conflicts, as we shall see. The Zúñigas, even if the two most important households in the "lineage" were no longer linked, kept acting as a lineage, strengthening their bonds through the transition clauses of the majorates and founding new branches.

The slightly atypical majorate of Ayamonte illustrates the case, without being exceptional, since the majorates of Zúñiga and Cárdenas studied by J. R. Palencia followed comparable rules. It was thought as a new cadet branch attached to two great "households", the Dukes of Medina Sidonia - Guzmán lineage - and the Dukes of Béjar - Zúñiga. The Marquisate of Ayamonte, in the extreme south-west of the Reino de Andalucía, was geographically enclosed within the Marquisate of Gibralforte - one of the seigneuries attached to the Duchy of Béjar - which itself bordered and was almost surrounded by the County of Niebla, the most important Guzmán seignury after the Duchy of Medina Sidonia. The clauses of the majorate support both these geographical connections and the intertwining of the two lineages. Ayamonte had belonged to the Guzmáns for several generations and was the dowry of Teresa

¹⁰ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 279, exp. 16 (1479).

¹¹ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 373, exp. 46 (testament, 1505).

de Guzmán, a natural daughter of the Duke of Medina Sidonia, when she married Pedro de Zúñiga, the eldest son of the Duke of Béjar, in 1454¹². Luis Salas presents it, not without reason, as the property of "a secondary branch of the Guzmán family" (Salas Almela 2016) : as it initially belonged to the Dukes of Medina Sidonia, the majorate insisted on the bearing the name of Guzmán. For all that, it was fully and to a greater extent part of the lineage policy of the Zúñiga family, Dukes of Béjar, as if it belonged to both lineages. It is not insignificant that it was founded by a widow - just like Villamanrique to which we will return later. Teresa de Guzmán founded it with royal licence in 1498¹³, fourteen years after the death of her husband, Pedro de Zúñiga, who had long been the expected and presumptive heir to the Duchy of Béjar as the eldest son of Alvaro I, but who had died before his father. By this time, her eldest son had succeeded his grand-father in the estates of Béjar and Teresa was seeking to pass on her own rights to Ayamonte, raised to the rank of county in 1475, which was the title her husband and her had carried and displayed during their lifetime. The aim was also to establish her youngest son, Francisco, who was 39 years old and unmarried, and who would not marry until the following year, once the seignery and title of Ayamonte had been secured. Teresa founded the majorate on the condition that if it returned to the elder branch, the two majorates would be incompatible, which meant that the succession would have to be transferred to a younger branch¹⁴. Renouncing to this foundation would have meant leaving her younger child with no position in the world, but also running the risk of this seignery from the Guzmán family being swallowed by the Duchy of Béjar upon her death. The founding clauses are quite eloquent from this perspective: they establish all younger children before the eldest as successors, and then the daughters; they make clear the precedence of the grandson descended from the eldest cadet over younger sons; they ensure that anyone holding the majorate bears the coat of arms and name of Guzmán, except in the event that his eldest son, the Duke of Béjar, should inherit - in the absence of other sons -, since the duchy "is a larger household"¹⁵. In this case, given the impossibility of amalgamating these majorates, they would have to be separated in the following generation in order to recreate a younger branch.

Over time, this choice led to alternating alliances between the elder and younger branches, enabling the two lines to be maintained in each generation. Initially, Teresa's youngest son, Francisco de Zúñiga y Guzmán, succeeded her, becoming a count and then a marquis of

¹² Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 215, exp. 26 (marriage contract)

¹³ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 281, exp. 2.

¹⁴ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 280, exp. 15.

¹⁵ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 280, exp. 15.

Ayamonte after the county had been raised to this rank by Charles V. However, the Marquis only had one daughter as heir, Teresa de Zúñiga, who, as we have already mentioned, found herself at the head of the Duchy of Béjar after her marriage to Alonso Francisco de Sotomayor, thanks to the extinction of the eldest branch. Although during Teresa's lifetime, the accumulation of majorates on her head led to a series of legal proceedings against her by other pretenders, which are well documented in her will¹⁶, she managed to retain them all and, as this accumulation was not meant to last, the two lines separated again in the following generation: Ayamonte passed to the couple's youngest son, Antonio, and then to his eldest, Francisco, married to a daughter of the Duke of Béjar, the closest cousin. In the next generation, the same pattern was repeated: the eldest son of the Marquis of Ayamonte, Francisco Silvestre de Guzmán, was married to the daughter of the Duke of Béjar, and more precisely to the one who was legally his eldest, since all the others were either dead or in a convent. The two lines ran parallel. This situation can be partly explained by the geographical solidarity of the seigneuries - at this period, the eldest branch had long been based in Gibraleón - partly by the financial “crisis of the aristocracy”, which struck the Zúñiga hard (Jago 1982), and partly by the need, in the absence of new resources, to maintain the family patrimony in order to endow the cadets, not without intense conflict over the payment of dowries. For two generations, each of these households acted as if marriage to a patrilineal cousin were preferable, even to the closest degree, in order to preserve the majorates and their solidarity, a reflex which is less a local variant of the “Arab marriage” (Barry, 2008), even if its circumstantial justifications may be comparable (cost reduction, in particular) than the effect of the majorates themselves as they shaped the family. This proximity, which gave rise to very close consanguineous alliances between the heirs of the two family, also fed a specific perception of the prohibited degrees of kinship, completely at odds with the canonical norm. If we are to believe the ease with which these families obtained (very expensive) dispensations, this extra-legal situation did not pose any problem in everyday aristocratic life. On the death of the Marquis Francisco Silvestre de Guzmán, who was imprisoned and later beheaded for his participation in the conspiracy against Philip IV in the early 1640s with the Duke of Medina-Sidonia (Salas Almela 2013), the Marquisate passed to his sister Brianda. Married to a cadet of the Duke of Medina-Sidonia, and then to the Marquis of Mondéjar. As she left no heirs, the Marquisate of Ayamonte reverted again to the Zúñigas' eldest branch. The case demonstrates that the question of which lineage the majorate 'belonged to' is a tricky one: Ayamonte was precisely a 'household' (with its palace,

¹⁶ Archivo General de Simancas, contaduría mayor de Hacienda, leg. 499, exp. 8.

pantheon, administration and patronages) dependent on a majorate whose rules - the clause on the name - placed it in the *emic* 'lineage' of the Guzmáns, but which mostly depended on the politics of the Zúñigas.

This situation became even more complex with the introduction of a third line, around another cadet majorate, that of Villamanrique, which on the expiry of the cadet line that held Ayamonte disputed the majorate with the eldest branch¹⁷. It was founded by Teresa de Zúñiga (†1565), Duchess of Béjar, whom we have already met, for her third son, Alvaro, who was already married at the time, on condition that he bear the name of "Manrique de Zúñiga" - a way of isolating the branch onomastically and a condition that was only respected when it was necessary to assert one's rights - and on condition that the title was not combined with another more prestigious one, whose name and coat of arms would have precedence. The succession clauses were classic, and Teresa organised an order of succession between all the branches of her sons on condition that "as far as possible"¹⁸ the Marquisate of Villamanrique was not joined to the majorates of Béjar and Ayamonte. Teresa's will is framed by lineage, with an eloquent obligation in the event of succession by daughters: those who can or must succeed to the majorate must marry "within the lineage", i.e. with someone who bears the father's name, before marriage if they are heirs ("who bears the name and arms of Zúñiga before marriage and not after"). It should be noted that at this stage, when the household of Béjar was already heavily in debt, the foundation of a majorates was the only credible solution to enact a real lineage policy and establish several lines, as the majorate, by its very nature, was theoretically beyond the reach of creditors. These new branches, each with its own household, were intended to remain close to the eldest line, but they could only support it from a distance, without their properties being able to increase the majorate. The succession to the Marquisate of Villamanrique, which has been studied by Antonio Herrera García and Vicens Hualde (Maria Vicens Hualde 2018; María Vicens Hualde 2017), clearly demonstrates the maintenance of a form of parallel line and the persistence of economic solidarity between the lines, as the eldest branch – the most indebted - sold the family palace in Seville to the cadet line, so that it remained within the family. The more recent one was governed by a rule of male primogeniture and was passed down in a parallel line, without damage, to Josefa de Zúñiga, the third person to hold the majorate. She did not marry "into the name", but her husband, Melchor Pérez de Guzmán y Sandoval, a younger brother of the Dukes of Medina Sidonia, was not without rights,

¹⁷ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 281, exp. 37.

¹⁸ Archivo General de Simancas, contaduría mayor de Hacienda, leg. 499, exp. 8. Archivo Histórico Nacional, sección Nobleza (Toledo), Baena, leg. 25, exp. 14.

as he descended directly from the founder of the majorate, Teresa, through his eldest daughter four generations earlier. Their son Manuel Luis took the name Guzmán y Zúñiga and succeeded to the Marquisate of Villamanrique. It was during his lifetime that the House of Ayamonte failed, in 1664, as we already commented. The Marquis of Villamanrique and the eldest branch of the lineage fought over it, which the Duke of Béjar, Manuel Diego, and his younger son, Balthasar, Marquis of Valero, claimed as their "property". They were awarded it in a ruling in July 1677¹⁹ but when Balthasar died in 1727 and there was no successor in the elder branch, Ayamonte was reverted to the younger branch of the Marquises of Villamanrique.

The last example of a cadet's majorate passing from one branch to another, the Majorate of Valero was founded on 22 September 1632 by Francisco Diego López de Zúñiga y Sotomayor, Duke of Béjar, in favour of his youngest son, when the Marquisate of Ayamonte was beyond his reach²⁰. When the Duke died four years later, the eldest son, Alonso Diego, inherited the Duchy of Béjar and the youngest one, Juan Manuel, the Majorate of Valero, which was established as a marquisate on 19 September 1636, a few weeks before the father's death. However, when the eldest son died on 1 August 1660, childless, the Marquis of Valero inherited the title of Béjar. By virtue of an incompatibility clause between the dukedom and the marquisate, intended to establish the cadets²¹, Juan Manuel renounced his marquisate to accept the ducal inheritance²². One majorate supplanted the other and it was therefore Juan Manuel's youngest son, Balthasar de Zúñiga y Guzmán, who succeeded to the Marquisate of Valero. When Juan Manuel died a few weeks later, on the 14th of November, the eldest son, Manuel Diego López de Zúñiga, became Duke of Béjar, while the future of the younger branch was already assured. The Marquisate of Valero remained in the lineage - and as always, the final clause of succession to the Marquisate implied that if the lines died out, the successor had to be at least a member of the "lineage", this time in the broadest sense of the term. When Balthasar died in 1727, with no children of his own, and since the Duke of Béjar, his nephew, had only one son to whom the dukedom was promised, the marquisate passed to María Loreto Dávila Zúñiga, the only descendant of the founder of the majorate through males (and technically the eldest, but they only had one heir), from his second marriage, thus remaining in a lateral branch, not without conflict once again.

¹⁹ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 292, exp. 2 and leg. 281, exp. 2 to 36.

²⁰ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 315, exp. 34.

²¹ Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 259, exp. 170.

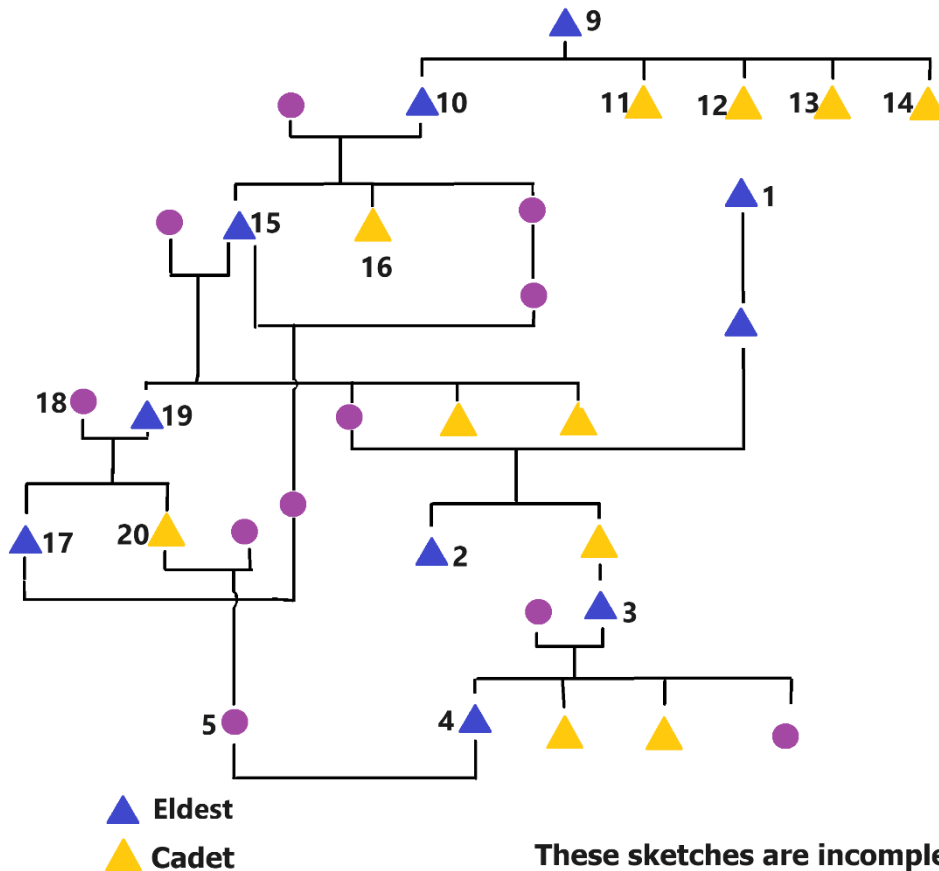
²² Archivo Histórico Nacional, sección Nobleza (Toledo), Casa de Osuna, leg. 315, exp. 14 and leg. 287, exp. 2.

Finally, we can now return to the relationship between the lineage and the household in the structuring of family relationships, building on the majorates. Our cases argue for the persistence of lineage from the mid-16th century to the mid-17th century as an intelligible framework for the transmission of majorates and matrimonial policy. Conflicts did not weaken it but confirmed its relevance: if there were some, it was primarily because the founding clauses of each majorate shaped a matrimonial policy which increased competition between the lines in the hope to keep them close. What these conflicts undermine is a romantic idea of the lineage as an accepted family framework, in which the *pariente mayor* exercises paternalistic discipline and in which the cult of ancestors endures beyond three generations and guarantees a form of peace in intra-family relations. It is doubtful that, even at the end of the Middle Ages, when these families were founding cadet branches with each generation and when this proliferation gave a high profile to the lineage, and to what Franco calls “collective” or “broad kinship”, such a system would really have existed. This does not mean that family relationships were strategic, cynical and dictated by patrimonial calculations. There was indeed a family discipline, sometimes difficult to impose, and a patriarchal power, of parents over children and of men over women, which enabled noble households to have a coherent patrimonial and matrimonial policy and which was supported, to a large extent, by the cult of the founders and ancestors. However, this discipline was difficult to maintain, had a limited scope and could not be extended to an entire lineage, in the broad sense given to the term by historiography for the end of the Middle Ages. It was impossible to sustain when majorates accumulated within a family, each one carrying its own memory and obligations. When majorates and seigneuries came together, they tended either to merge and cause one household to die out, becoming part of a more powerful one, or to split up again at the next generation by passing to a younger branch, thus producing other households, descended from different founding ancestors, each with its own geographical base and a tendency to become autonomous, even if this meant competing with the other households in the lineage. In such conditions, the *pariente mayor* of a great lineage had little or no authority over other noble households born of the same lineage. However, the “household” did not mechanically succeed the “lineage”, as the key element explaining family structure within the nobility, as the patrimonial relationships between the majorates imposed obligations of alliances or an interplay of succession between elders and cadets, which ensured that a form of lineage solidarity endured. In each generation, by founding for the cadets, the great households maintained a form of “lineage projection” by continuing to found new branches of their lineage likely to become autonomous, but which remained linked to the eldest branch and could return to it in the event of failure. The lineage remained

structuring over time through conflicts, but also as a mean of projection, as soon as the family's finances allowed it, through the creation of new majorates when the previous majorates founded for the cadets drifted away: this was the case of the Marquisate of Villamanrique, then that of Valero, late in the 17th century, as it had been with the Marquisate of Ayamonte earlier. In the 15th century, thanks to the patrimony accumulated through royal favour, the first generations were able to found for several sons, and organized the solidarity between each line, if one was failing. A large number of well-known factors made such situation increasingly rare in the 17th century, but the system kept on, on a more reduced and discreet scale, thanks to the resort to majorates and in spite of increasing conflicts. In times of economic weakness and with a reduced number of heirs (at the end of the 16th century), marriages between the younger and elder branches were mutually beneficial and ensured the preservation of the patrimony in a lineage that had nothing to do with collective and distant kinship, but was built on the fragile association between different households, one belonging to a different line. However, the atmosphere undoubtedly changed around the middle of the 17th century. Until the beginning of the 17th century, these alliances were common, with the successive marriages between the Dukes of Béjar and the Marquises of Ayamonte, but they subsequently disappeared and the lineage was no longer anything more than a framework for conflict, which nurtured a more complete autonomy of the lines. At this stage, the logic of the households, as shown by J.H. Franco, finally prevailed. Moreover, the minor households of the lineage, which until then had been autonomous, were slowly absorbed into conglomerates of larger majorates, blurring the hierarchies between the lines. The accumulation of majorates was therefore both a means of extinguishing minor households by diluting them into larger ones and a means of definitively emancipating the strongest households from the constraints of their original lineage.

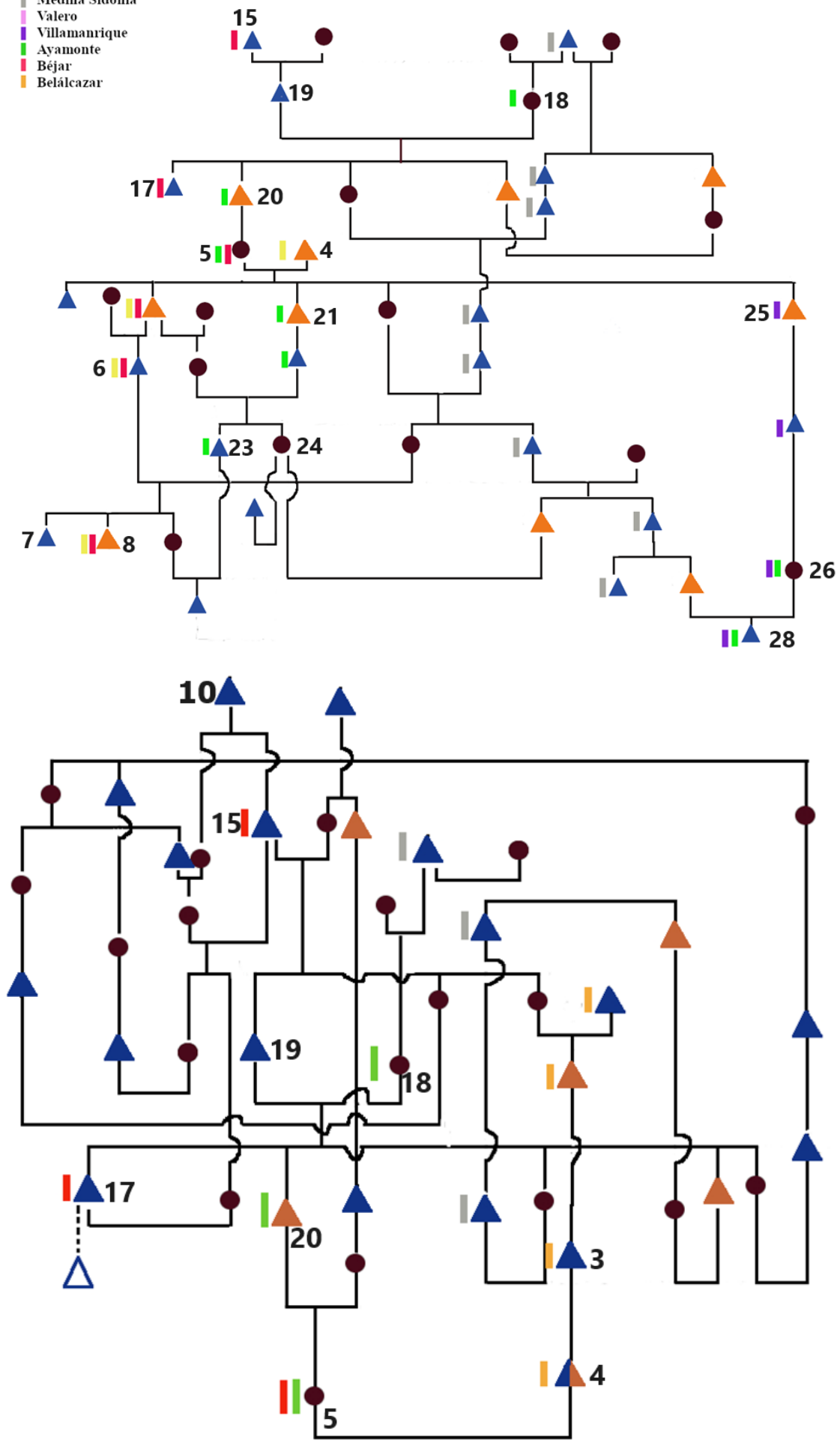
- 1 – Gutierre de Sotomayor (†1453)
- 2 – Juan de Sotomayor, al. de la Puebla, O.F.M. (†1495)
- 3 – Alfonso de Sotomayor, al. de la cruz O.F.M. (†1524)
- 4 – Alonso Francisco de Sotomayor (†1544)
- 5 – Teresa de Zuñiga (†1565)
- 6 – Alonso Francisco de Zúñiga y Sotomayor (†1601)
- 7 – Francisco de Zúñiga y Sotomayor, al de la Cruz, O.P.
- 8 – Alonso Diego de Zúñiga y Sotomayor (†1619)
- 9 – Diego López de Zúñiga (†1417)
- 10 – Pedro de Zúñiga (†1453)
- 11 – Sancho de Zúñiga (†1450)
- 12 – Iñigo de Zúñiga (†1420)
- 13 – Diego de Zúñiga
- 14 – Gonzalo de Zúñiga (†1447)

- 15 – Alvaro I de Zúñiga (†1488)
- 16 – Diego López de Zúñiga (†1479)
- 17 – Alvaro II de Zúñiga (†1532)
- 18 – Teresa de Guzmán (†1502)
- 19 – Pedro de Zúñiga y Manrique (†1484)
- 20 – Francisco de Zúñiga y Guzmán (†1525)
- 21 – Antonio de Zúñiga y Sotomayor (†1583)
- 22 – Francisco de Zúñiga y Guzmán (†1607)
- 23 – Francisco Silvestre de Guzmán (†1648)
- 24 – Brianda de Zúñiga Sarmiento (†1664)
- 25 – Álvaro Manrique de Zúñiga (†1604)
- 26 – Josefa de Zúñiga (†1680)
- 27 – Melchor de Guzmán y Sandoval
- 28 – Manuel Luis de Guzmán y Zúñiga (†1692)
- 29 – Manuel Diego López de Zúñiga (†1686)
- 30 – Francisco Diego López de Zúñiga y Sotomayor (†1636)
- 31 – Juan Manuel de Zúñiga y Sotomayor (†1660)
- 32 – Balthasar de Zúñiga y Guzmán (†1727)
- 33 – María Loreto Dávila Zúñiga (†1749)



These sketches are incomplete: in most cases, several children are missing.

- Medina Sidonia
- Valero
- Villamanrique
- Ayamonte
- Béjar
- Belálcazar



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