

FAMILY CHANGE, CASTE, AND THE ELDERLY
IN A RURAL LOCALE IN NEPAL*

ABSTRACT. This study reports research conducted in a rural Nepalese Hindu Community to examine three questions: (1) the nature of family structure of the elderly roughly 4 decades ago; (2) whether the family structure at that time was the same for high and low castes; and (3) whether the past situation differs from that today. Four decades ago 78% of elderly high caste males were living in the ideal Hindu joint family structure compared with only 24% of the low castes. Today just 50% of the high castes and 42% of the low castes live in joint families. The difference in the past derives from access to and control over economic resources. Economic changes since 1950 have increased access to economic resources and altered the family structure of the high castes but not the low castes.

Key Words: Nepal, change, caste, family, elderly

INTRODUCTION

Traditional Hindu ideals prescribe a large joint family headed by the father. All the father's sons, daughters-in-law, unmarried daughters and grandchildren should form a joint family which manages and works the family's land and resources under the authority of the patriarchal elder male who controls the household's affairs and is the legal holder of the family's land. Younger household members should serve, respect and defer to the patriarch. The nature of relationships within Indian Hindu joint families is expressed below by Mandelbaum (1970) and Rowe (1979) both of whom emphasize what Caldwell (1982) refers to as the "patriarchal and autocratic aspects of the familial mode of production":

(1) Children owe permanent deference to both parents. Parental authority is unceasing as an ideal and is sustained in fact, though the actual duration and degree of this authority are affected by economic circumstances and jati [caste] tradition. Within a household a son or daughter must not flout a parent's will, especially not the father's. If grown sons do not wish to follow a parental mandate, they usually find ways to circumvent rather than to contradict it. . . . The ideal of deference to parents is rarely questioned, and in practice it endows the elders with an authority that is not lightly ignored by their children (Mandelbaum 1970: 39).

(2) For the male, unless he be physically or otherwise incapacitated, the later years of life bring an increased importance in an already male-centered society, for it is only then that familial and other types of leadership are possible. The position of Malik ('owner' or 'manager') of a large, extended family is one of tremendous responsibility, challenging the organizational capacities of any male. The Malik is responsible for the behavior of all members of the family unit, and it is to him that the village elders speak should a member of his family transgress the accepted rules of behavior. He is the executive head of the family as an economic unit. . . . The control is so complete that it

is not unusual for a son working in Bombay to write for the Malik's sanction to make some purchase, even though it is to be paid for out of the young man's salary (Rowe 1979: 105).

Elderly Hindus in Nepal subscribe to these ideals, but today commonly assert that the family no longer operates that way. They claim that when they were young all sons lived with their wives and children in joint families headed by the father at least until the father's death. They reminisce about their father as the autocratic head of the family and tell anecdotes of being so terrified of him, even as adults, that they would not look directly at him when speaking and would usually ask for things from him through their mother. Today, however, they claim that all this has changed, that contemporary sons and daughters-in-law do not respect and obey their elderly fathers and mothers like they did in the old days. They cite as evidence the fact that today's married sons typically separate from their natal family and form their own households while their father is still alive, and that sons care more for their wives than their parents. The comments of a 60 year old high caste man living with his wife and two sons in Kathmandu, the capital of Nepal, poignantly exemplify this often repeated theme:

Modern children do not respect their elders even 5% of what we used to do to our elders. You can have the example of my eldest son. He earns his own income so he has separated [formed an independent nuclear family household] from us. The sons who do not earn are living with me. One day they will also separate when they start earning. I do not know why the modern generation does not want to care for their elders. I have seen that if you love or care for even an animal it does the same for you in return. But despite all the love and care we have given to our sons, they behave in such a way. I wonder why this is so. We do not expect money or economic support but we want love and care from them. It hurts us when we do not get even love and care from them. They do not like to come to me for advice. They do not want to provide good foods and medicines. . . . It is foolish to think that one can have economic support from the younger generation in our old age.

His wife independently gave the same report and added "This is not the story of one house; you will find the same wherever you go". Another elderly man said:

In my youth the order of one's father was final. No one could question it. No one could dare go against it. But these days parents are nothing. Before doing anything we used to discuss the matter with our father and it was only after he gave his approval that we could do it.

These feelings are also prevalent in Nepalese villages. For example, a rural high caste Hindu male aged 68 stated:

We elderly people are not heard by the younger generation . . . the children of these days do not have time to hear their parents so there is no question of respect or

obedience as we did in the past. After they get married and stay in the joint family they find difficulty in adjusting. They like to hear their wives rather than their parents. In our youth we used to hear our parents and obey them rather than the wives. Till the death of the father the family was seldom separated in those days. Everyone used to live in the same house until the death of the parents. But I do not find this these days. . . . Due to this, my youth cannot be compared with these days.

The complaints of these elderly Nepalese echo those expressed in many non-Western societies where the elderly bemoan the negative impact of change on their power, authority and status and reflect back on what they claim were better times when sons and daughters-in-law obeyed parents and dutifully served them in their old age. For example, an elderly man in Kenya said, "The young have learned our tricks and have learned new tricks. They have ways of evading being brought back into the traditions." And an old woman said: "The old and the young should not live together any more. Most children of this generation do not know how to treat old people" (Cox and Mberia 1977: 15-17). Indeed there is a large literature on the inverse relationship between modernization and the status of the elderly (e.g., Bengston, Dowd, Smith, and Inkeles 1975; Cowgill 1974; Cowgill and Holmes 1972; Finley 1982; Foner 1984; Goldstein and Beall 1982; Goldstein, Schuler, and Ross 1983; Palmore and Manton 1974).

If the feelings and comments of the elderly Nepalese cited above are correct, they lend support to the contention of modernization theorists that extended families break down under the impact of modernization leaving the nuclear family as the dominant family form. This family transformation, in turn, negatively affects the status and well being of the elderly (Cowgill 1974). However, the statements cited above may not be correct. Similar beliefs about the family and the elderly in the United States and Western Europe were once widely expressed, but recent empirical research by historians and historical demographers does not support them. Instead it shows that the majority of the elderly never lived in joint or extended families and therefore the substantial numbers of elderly now living alone in contemporary Western society is *not* the consequence of the breakdown of extended families due to industrialization (Demos 1978; Greven 1970; Hareven 1982; Smith 1973). As one influential family historian writes:

Historical research has laid to rest the assumption that the isolation older people are facing now is the result of the breakdown of the three-generational extended family under the impact of industrialization. The prevailing pattern over the past three centuries in American Society and in Western Europe has been one of continuity in nuclear household arrangements (Hareven 1982: 3).

Such findings raise an obvious question. Are the comments of the Nepalese and other non-Western elderly accurate or are they exaggerations and idealizations of the past? Were elderly Nepalese males really the

patriarchs of joint families which they controlled autocratically? Has a breakdown in the traditional three or four generational joint family occurred over the course of one generation, and, if so, is this responsible for increasing the problems and decreasing the well-being of the elderly there? Questions such as these are crucial to our understanding of the forces affecting the aging experience in today's Third World societies.

Empirically investigating this issue, however, is not easy. Nepal and many other Third World countries have no written church records or registers from which to reconstitute family histories by the historical reconstruction techniques that have proved so enormously insightful in the West. While this make clarification of the situation of the elderly in the distant past extremely difficult, some time depth can be obtained by oral family history reconstruction. The oral interview approach is particularly efficacious in the Nepalese case because that country only opened to the West in the early 1950s and substantial change/modernization thus began well within the adult lifespans of contemporary elderly who were born before 1923.

This paper reports findings from a study which used family history interviews to determine family structure at two points in time in a rural Hindu Nepalese population. The investigation considered three questions: (1) What was the family structure of the elderly roughly forty years ago;¹ (2) Was the family structure the same for high and low castes, and (3) Does the current family structure differ from that found today?

Material and Methods

Data to answer these questions were collected in 1983 as part of a study of the health, physical fitness and social situation of the elderly in rural Nepal (see Beall, Goldstein, and Feldman 1985a and b, and Beall and Goldstein in press a and b). The study involved all but 4 of the 50 Hindu males 60 years of age and over living in 3 sections (wards) of Chetbesi, an agricultural community in rural Lamjung District, Central Nepal. This population consisted of: (1) 26 high caste males (Brahmins and Chetris), and (2) 20 low caste males (leatherworkers (sarki), tailors (damai), and blacksmiths (kami)). The mean age of the high caste men was 69.1 years and the mean age of the low caste men was 63.5. The high castes are the main landowners and are today predominantly middle income or well-to-do (in village terms). The low castes own or lease agricultural land, but their plots are usually small and of poor quality yielding only a few months' food. They rely, therefore, on providing services to the larger landowners and earn their livelihood predominantly as craftsmen and manual laborers (e.g., in agriculture and portering). They are and were typically low-income, although in a few cases their households are equivalent today to the middle-income stratum among the high castes.

Information on the family in the past generation was obtained as part of an in-depth open-ended interview guide. Each participant was interviewed by a Nepalese researcher experienced in interviewing the elderly. Every effort was made to keep the interview informal, and the sequence of questions was varied to facilitate the flow of the 'conversation'. Respondents were encouraged to expand on answers and lengthy responses were normal. Repeat visits were made if the initial information was unclear or if subsequent information raised new questions. Since this was part of a larger study, all interviewees were well acquainted with our staff and project by the time the interview took place.

A major part of the interview concerned past and present family history. Data were gathered on the composition of: (1) subjects' families when today's elderly were youths, and (2) their families today. Each participant was asked to describe the composition of his natal household at the time of his father's death and of his own household at the time of the interview. A measure of the dominant position and status of the elderly, particularly fathers, is the prevalence of joint families under the management of the father at the time the father died. Family composition one generation ago was measured in terms of whether or not a man and his brothers (together with their wives and children) were all living in their father's household at the time of his death. If they were, this is interpreted as conforming to the traditional ideal joint family structure. If some or most sons had already separated by the time their father died, this is interpreted as not conforming to the ideal. Census and participant observation supplemented the interview data on current household structure. These interviews, consequently, provide information on family structure at two points in time.

Results

High castes. At the time of their father's death, 78% of today's high caste elderly were living in joint households managed by their father (see Table I). This finding supports the contention of today's elderly that when they were young, the high caste elderly lived in and controlled joint families. In virtually all of the cases, the family (i.e., the surviving sons) separated into 2 or more independent households within 5–6 years of the father's death. This supports the contention that it was the father's power, authority and status that held the joint family together.

In contrast, the *current* situation for the high caste elderly differs significantly as only 50% live with all their sons (Chi-Square (1) = 7.5, $p < 0.01$). This percent is certain to decrease by the time these elderly respondents die since in 5 of the 11 current joint families, one or more sons did not actually live at home, although the family was not legally separated. In 3 of these 5 cases, one or more married son(s) lived and

TABLE I

Comparison of percent of elderly men now living in a joint family with the percent living in a joint family at the time their fathers died

	Now	One generation ago
High caste	50% (11/22) ^a	78% (18/23) ^c
Low caste	42% (8/19) ^b	24% (4/17) ^d

^a 4 individuals had no living sons and thus were excluded from the calculations.

^b 1 individual had a living son.

^c 3 individuals were omitted to avoid overrepresentation because they were brothers in the same family.

^d 3 individuals were omitted because their father died before they were born. None of the 17 individuals included were brothers.

worked in distant localities but left their wives and children with their parents. In these instances the natal household was providing an important caretaking role in the sons' absence. According to local opinion, when these sons return home, it very probable that one or more of them will separate from their parents. In another of the 5 cases, the lone married son and his family lived in a different region where the family owned agricultural land and maintained a house. In the last case, a son was studying in Kathmandu and had left his family with his parents. If we were to exclude these cases of non co-residence, only 27% of today's high caste elderly are living in joint families.

Low castes. When today's elderly were young, the low caste family structure was significantly different from that of the high caste patterns. (see Table I.) At the time of their father's death, only 24% of today's low caste elderly were living in joint families headed by their father. In the vast majority of cases, sons had separated from their natal households well before their father's death. Thus, while the traditional Hindu family ideal was nearly universal among the high castes, it was relatively infrequent among low caste families a generation ago (Chi-Square (1) = 9.7, $p < 0.01$).

However, unlike the high caste experience of significant change in family structure over the past generation, the low caste elderly experienced relatively little change. Today 42% live in joint families versus 24% a generation ago (Chi Square (1) = 0.4, $p > 0.01$). Today the same proportion of high and low caste families are joint (Chi Square (1) = 0.4, $p > 0.5$).

Discussion

This study found significant caste differences in Nepalese Hindu family structure forty years ago. Elderly high caste men typically lived in and controlled joint families until they died whereas elderly low caste males typically lived in stem families with one married son, their other sons having separated soon after their marriages. It also found that changes in the high caste family structure have eliminated this caste difference.

These changes are explained by different subsistence patterns which were produced by differential access to economic resources. The high castes were the dominant landowners and thus were dependent primarily on land for their economic well-being. Land, however, was held in the father's name and actually controlled by him until his death. Although sons had demand rights to a share of the ancestral land, the head of the family, the father, decided how much land and which plots to give a son. Thus, while local norms certainly permitted sons to separate from their parents and establish their own households before the death of their father, they could not demand an equal share of their ancestral land or of the land their father had acquired during his lifetime. The father had the right to take whatever part of the ancestral property he wanted as his *jeeuni* or 'share' so long as he gave his sons enough to subsist on. Moreover, the father had *complete* control over all money, gold, etc., he had amassed during his lifetime. The following example of Karga, a 69 year old man, illustrates the power of fathers a generation ago.

I got married at the age of 15. I separated from my father and younger brother two years after my mother died. We had a lot of animals in those days and were heavily into animal husbandry. I always used to stay in the herders' hut looking after the animals. My wife stayed in the village family house. She, however, was badly mistreated by other family members, particularly by my younger brother and his wife. My father was always siding with my younger brother who was a cunning fellow and knew how to twist things. Once when I came home from the pasture my wife told me how she was being abused so I told my father that I decided to separate and set up my own household. My father was angry and against me for wanting to break up the family. My brother twisted it to make it seem I had been trying to split the family. He also forced my father to keep half of the whole property as his *jeeuni* [share] dividing the other half between my brother and me. Thus I only received 1/4 of the land instead of half. After separation my younger brother stayed with father. Father had complete control of his *jeeuni*. He could give it to anyone. My brother filled the ears of my father against me, and my father believed what he was told. He disliked me after separation as long as he lived. Before his death he transferred all the land into the name of his younger son. I could do nothing but watch.

The worst part of our division of property was the cash and other valuable goods. At the time of separation when I asked my father about these, my father said he would divide all these after a few months when all the land division was completed. After a few months when I reminded him of his promise he got angry and told me he would distribute it later. After about a year and a half passed I again went to him and asked

about this but this time also he got angry and told me he had spent all the money and there was nothing left to divide. He told me I had already gotten all of my inheritance . . . when I think about cash and other valuables, I am of the opinion I got only 5% of my father's property. [We asked him why he didn't bring a case against his father and he replied:] How could I bring a case against my father that he did not give me a share of his *jeeuni* when he had complete control over it. He could do whatever and however he wanted.

As this account reveals, the father controlled the land and wealth of the joint family and could punish a son severely for disobeying him and forcing division of the joint family. Moreover, if a father was separated from an only son or from all his sons, he could adopt another person (who would look after him in his old age) and give his *jeeuni* to that person. Similarly, the father had sole rights to decide whether or not he would use joint family funds to construct a house for a separating son. All of this placed the aging high caste father in an extremely powerful position vis-à-vis his sons because young high caste males at this time had limited economic alternatives to farming. The means of achieving a comfortable life lay in obtaining one's share of the family land and wealth. Salaried employment was not the viable alternative it is today. Consequently, in addition to the strong Hindu value on deference and obedience to the father, inheritance anticipation was a powerful motivation underlying the decision of most sons to remain under the authority of their father until he died. As we have seen, sons who alienated their fathers and left the family on bad terms could conceivably receive only a reduced share of property.

Changes during the past 4 decades, however, have diminished the family's traditional role as a unit of both production and consumption. By providing alternative sources of income directly to sons, these economic changes have broken the power of fathers:

Chetbesi is situated near a small district center that is fast becoming a small town, and there are now non-agricultural, non-manual labor opportunities available in the local area through government service and shop-keeping. There are also opportunities for employment in the cities of Pokhara or Kathmandu, both now only a day or two away due to the completion of a new motor road. In particular, the level of government activities in Nepal has increased dramatically and this, more than anything else, has generated many new jobs. Consequently, sons are no longer dependent completely on a single resource controlled by their father — land. They can aspire to attain a comfortable income by other means and no longer have to bear unpleasant joint family environments until their father dies. It is now quite common for a son to bring his bride into the joint family initially but then separate after a few years due to internal discord. The consequence of these economic changes is the significant decline in the number of joint families controlled by the high caste elderly father.

The same factors account for both the unchanging low caste family structure and the former low-high caste difference in family structure. Just as today, forty years ago low caste families could not subsist on the small fields they held. Low caste men, although they accept the same set of family ideals as high caste men, unanimously indicated that wage labor has always been critical to their economic subsistence. These low castes males were the hereditary craftsmen in the village (tailors, cobblers and blacksmiths), provided the agricultural labor for the land rich high castes, and worked for wages as porters carrying loads up and down the rugged trails. This low caste dependence on wage labor rather than landowning underlies the differences in family structure. One low caste Damai (tailor) who together with his two brothers separated from their father before he died, explained the reason for this:

We Damai those days were very poor and still are poor. We did not have large assets [property]. . . . Our main asset is the skill to sew clothes. At the time of the separation we three brothers, in-laws and many children were living in the same house with our parents. Compared to income, there were many mouths to feed. Besides, in-laws could not get along with each others. My parents had great difficulty satisfying every member of the family. So we sons and our parents began to think that we could do better economically and be more happy if we were separated. The family had no huge assets. The Damai's source of income was sewing. . . . The income from our land was not sufficient even for one month for the whole house. Almost all the Damai's lives were the same from the standpoint of subsistence. So unlike the Brahmins and Chetris who had huge assets of land, the Damai families could be separated anytime. There was no hope that a son would get a large share of the property if he remained living with his parents.

In the past, just as today, low caste young men frequently separated from their father after marriage because they had little economic incentive to remain together. The bulk of their livelihood, as indicated above, was derived from their own labor (and skill) rather than access to land. As long as they were members of their natal joint family they were expected to turn over all their earnings to their father who made decisions about its allocation. This led to considerable friction. It is said that fights between siblings were common when one brother with greater skill in his traditional craft (and thus earning power) brought more income to the family and wanted a greater share for his own wife and children vis-à-vis those of his brothers. Wages also led to arguments between low caste fathers and sons over the sons' earnings which fathers wanted to control. Since inheritance of land from the father was not of great importance among the low castes, such quarrels often resulted in a son separating from his father and brothers and living on his own wages. Thus, even forty years ago, the joint family ideal was not a genuine expectation for the low caste elderly. The economic changes that have occurred in Chetbesi over the past decades have not altered this in any substantial way, although on the

whole they have benefitted the low castes economically. The low castes still subsist primarily through their own wage labor but now there are more opportunities for wage income, e.g., in the local construction trade. This, in turn, has enabled a few successful low caste families to purchase new land from high caste families and has produced a general feeling among the low castes that they have greater economic security now than when they were youths.

Conclusion

Availability of new sources of individual income via employment has reduced the power high caste fathers held over their sons by undermining the fathers' monopoly of the means of production. Increasingly, the availability of economic alternatives has allowed sons to deal with the traditional stresses and tensions inherent in the joint family structure by instituting family fission and starting their own nuclear households earlier than in the past. This transformation from a joint family structure to that of an extended, stem (fathers with one son and his family) or nuclear family structure has coincided with changes in the power, authority, and expectations of the elderly, and it is these which have led to the remarks cited at the beginning of the paper.

These economic changes, however, have had no negative effect on the lower caste elderly who traditionally earned their subsistence by individual labor for wages in kind or money. Since sons were not very dependent on land for their livelihood, the power and authority of their fathers over them was much less than that found in the high castes. Thus, despite the fact that they placed the same high value on maintaining a joint family, the reality for the low caste elderly was more likely to be stem and nuclear families, or living alone.

The data show, therefore, that the general findings of historical reconstruction studies in the West cannot be assumed to reflect a parallel phenomenon in non-Western societies such as Nepal. There has, in fact, been a breakdown of joint families in this rural Nepalese community, albeit only in one social grouping, the high castes. The impact of modernization on the family and the elderly was clearly dependent on the differing relationship of high and low castes within this community to economic resources. It was not change per se that negatively affected the elderly, but changing access to productive resources that did, and then only with respect to one social stratum, the high castes. In fact, for the low castes, there is evidence that these changes have actually improved their economic well-being. These findings support the observations of other studies regarding the importance of understanding the elderly's relationship to and control over resources both in traditional and rapidly changing non-Western societies (e.g. Caldwell 1982; Dowd 1975; Goldstein et al.

1983; Press and McKool 1972; Rosow 1965; Simmons 1945). It also echoes other findings that modernization does not inevitably worsen the situation for the elderly and may in fact improve it either directly or after an initial decline (e.g. Holmes and Rhoads 1983; Palmore and Manton 1974). In the years ahead, cross-cultural research on the elderly will have to pay careful attention to intra-societal variation and the interplay between culture, economic resources and social organization if it is to gradually reach some theoretical consensus regarding the nature and impact of the tremendous changes that have affected non-Western societies over the past four or five decades.

NOTES

* This research was supported by grants from the National Science Foundation (BNS82-19188), the National Geographic Society (2641-83), and the American Federation for Aging Research. A version of this paper was presented at the 84th Annual Meeting of the The American Anthropological Association, December 1985.

¹ Forty years ago refers to the average length of time since the death of the fathers of today's elderly ($\bar{X} = \pm 15$ years, $n = 35$).

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