

Past and present patterns of family formation in Eastern Europe: Does Hajnal's delineation still matter?

ALLAN PUUR, LEEN RAHNU

Estonian Institute for Population Studies, Tallin University, P.O. Box 3012, 10504 Tallinn, Estonia

E-mail: puur@tlu.ee; leen.rahu@tlu.ee

AUŠRA MASLAUSKAITĖ, VLADA STANKŪNIENĖ

Lithuanian Social Research Centre, Institute for Demographic Research, 11 Goštauto Street, LT-01108 Vilnius, Lithuania

E-mail: amaslauskaite@ktl.mii.lt; vladast@ktl.mii.lt

This article explores the link between historical and contemporary patterns of family formation. The theoretical underpinnings of the study were derived from Hajnal's theory of historical nuptiality regimes in Europe. In general, the results suggest that all countries in the region share a common vector of changes in partnership formation, but at the same time the onset and advancement of these changes varies. The changes started earlier and have advanced further in countries that had experienced the western European marriage pattern in the past, and they began later and are less advanced in the countries with the historical eastern European marriage pattern.

Key words: family formation, historical marriage patterns, Eastern Europe

INTRODUCTION

Since the early 1990s, the demographic regime in Eastern Europe (EE)¹ has undergone profound changes. The transformation of partnership patterns has been at the core of these changes, with the spread of cohabitation and postponement of marriage as the most salient manifestations. A swift and marked turn toward a new model of partnership formation and equally radical changes in childbearing occurred more or less simultaneously and followed a largely similar path in all EE countries. Due to these commonalities, nuptiality and fertility developments are often regarded as homogenous across the region. In demographic thinking, these transformations are usually understood as a spatial and temporal extension of the changes that started in Northern and Western Europe in the 1960s and were in hindsight generalised by Lesthaeghe and van de Kaa (1986) in the theory of the Second Demographic Transition (SDT).

Against that background, recent research on the EE region has drawn attention to noticeable variation with regard to the onset and advancement of family patterns characteristic of the SDT (e. g. Hoem et al. 2008; Katus et al. 2008; Sobotka 2008). Although the forces driving these new patterns are usually sought in the structural and cultural conditions in contemporary societies, there is some evidence that they may also be linked with the more distant demographic past. Evidence in support of such long-term legacies has been found in several studies focusing on Western Europe (Lesthaeghe 1983; Lesthaeghe and Neels 2002, 2006). No

¹ Following Hajnal's (1965) terminology, the Eastern and Central European countries according to contemporary regionalism are called Eastern Europe in this article.

attempt has been made to establish whether similar linkages between the demographic past and present also exist in EE, however.

The aim of this article is to explore the association between contemporary family formation patterns and the historical nuptiality regimes described by Hajnal (1965). The spatial scope of the analysis includes seven countries: Estonia, East Germany, Lithuania, Russia, Hungary, Bulgaria and Romania. The time dimension stretches from the late 19th to the early 21st century.

The article is organised into three sections. It opens with a discussion of Hajnal's theory of historical marriage patterns and methods of its application. The second section presents data sources and methods used in the study. The third section on results is subdivided into two parts. The first part discusses the variation in the advancement of modern family formation patterns, and the second part examines the possible connection to historical nuptiality regimes. The article ends with concluding remarks.

THEORETICAL PERSPECTIVES: FROM HAJNAL TO THE SECOND DEMOGRAPHIC TRANSITION

Based on evidence from a large number of countries, John Hajnal (1965) identified the presence of two historical marriage patterns in Europe. He distinguished the western European marriage, characterised by a relatively high age at marriage (at least 23 years for females, often 25–26 years) and a considerable proportion of people who would never marry (10% or more). With regard to geography, Hajnal described the approximate boundary as running from St. Petersburg to Trieste. Areas west of this line shared the late and low-prevalence marriage pattern, whereas areas on the eastern side were characterised by earlier marriage and lower proportions of remaining single, termed the eastern European pattern. Later Hajnal extended his conception to distinct patterns of household formation in the above regions (Hajnal 1982, 1983).

Hajnal's work laid the foundation for a paradigmatic approach to the demographic history of the family from the 17th–18th century until approximately the 1940s. It divided Europe into *east* and *west* and largely pre-defined the orientation of research in family history from the mid 20th century to the present day. With regard to the degree of generalisation, Hajnal's ideas resemble large-scale theories or grand narratives as termed by postmodern thinkers. Like other theories of that kind, Hajnal's approach has been subjected to criticism on two main grounds.

Empirically, Hajnal's delineation has been criticised for the neglect of considerable variation on both sides of the line: areas east and west of the Hajnal line have not been homogenous. For instance, recent studies have shown that in today's Belarus, which fell into the demographic east, there is evidence of typically western household and family systems (Szołtysek 2008a; Szołtysek 2008b; Gruber and Szołtysek 2011). Second, Hajnal's critics note that the eastern and western marriage and household patterns follow the logic of partitions that circulated in the Western epistemics from the Enlightenment, polarising Europe along the boundaries of Roman and Byzantine Christianity or *German* and *Slavonic* worlds (Plakans and Wetherell 2005). In accordance with these ideas, Eastern Europe denoted the *other* world and exhibited deviation, backwardness, 'lagging behind', and a non-genuine Europe (Wolff 1994).

The contemporary reception of Hajnal's ideas varies between fundamental rejection and critical adaptation. Some urge giving up altogether the binary approach and attempts to single out, on the European continent, major regions for which certain household and family patterns are typical (Kertzer 1991). Others propose maintaining Hajnal's continent-differentiating perspective but adding differences at the regional level. Following this approach, Plakans and Wetherell (2005) have divided Eastern Europe into three sub-regions, and Mitterauer

(2003) singled out a transitional zone between the west and east that coincides with the eastern boundary of Germanic colonisation of the Middle Ages.

Plakans and Wetherell (2005) suggest perceiving the Hajnal line from a developmental perspective, as an outcome of structural and cultural forces. In this view, the connection between societal development and nuptiality patterns becomes dialectical. On the one hand, structural and cultural settings can furnish preconditions for certain countries and regions to drift from one family pattern to another. On the other hand, these patterns may have a capacity to reinforce specific economic, social and political configurations and cultural principles.

With regard to Eastern Europe, the developmental perspective puts greater weight on contextual variations and their influence on demographic patterns. In the late 19th century, differences in the region related to agrarian regimes, the advancement of capitalism, urbanisation, development of educational institutions, secularisation, etc. An example for this could be Estonia and Lithuania, two countries that in the 19th century belonged to the Russian Empire. In Estonia the abolishment of *corvée* occurred almost half a century earlier than in the majority of Lithuanian territories. Industrialisation and urbanisation in Estonia started earlier, while Lithuania, with a predominantly agrarian economy, at the turn of the 20th century still remained a relatively slowly modernising province of the empire (Norkus 2008). The role of religion in the formation of capitalism was fundamentally different in the two countries, but this may be more a result of active religious movements, such as pietism² in Estonia, than a product of major traditions of Christianity.

Even if the relevance of contextual factors for historical marriage patterns is acknowledged, it would be reasonable to ask whether these factors had a similar formative influence for family patterns in the late 20th century. Is it possible to establish a hierarchy among various factors and identify factors with a more powerful and prolonged effect?

Some tentative answers to these questions can be found in studies addressing the continuity of the first and the second demographic transition. According to Lesthaeghe and Neels (2002), 'the first demographic transition spatial differentiations stemmed from initial secularisation contrasts, whereas SDT spatial patterning is rooted in the offshoots of early secularisation that are connected with all aspects of individual autonomy and rejection of traditional forms of authority. The ideational continuity may supersede the structural effects...'. Another important finding has been reported by Coale (1992), who observed a systematic relationship between nuptiality regimes that prevailed in pre-modern Europe and the decline in marital fertility that occurred in the late 19th and early 20th centuries. The transition to controlled fertility started earlier in the areas in which the pattern of late marriage prevailed and later in the early-marrying populations east of the Hajnal line. Coale assumed that long-established contextual features accounting for late marriage also favoured the early adoption of new fertility behaviour.

In this article, we ponder whether similar reasoning could be applicable to the link between the contemporary changes in family formation and historical marriage patterns. We assume that the shift from direct marriage to cohabitation characteristic of the SDT started earlier in the countries where the western European marriage pattern prevailed in the 19th and early 20th century and that it began later in countries where this pattern was less pronounced or where it never emerged. To test this hypothesis, Eastern Europe offers a particularly valuable ground since the Hajnal line traverses the region.

² Pietism 'shaped everyday life in a way similar to the ethics of Protestantism articulated by Weber' (Norkus 2008).

DATA AND ANALYTICAL APPROACH

The empirical evidence for the verification of our hypothesis comes from two sources.

For the analysis of the contemporary partnership formation patterns, we use the Generations and Gender Survey (GGS). The countries included in the analysis are Bulgaria, East Germany, Estonia, Hungary, Lithuania, Romania and Russia. The GGS is based on nationally representative samples of men and women aged 18–79. Following the practice frequently used in studies of family formation, the analysis is restricted to female respondents³. The analysis focuses on the shift from direct marriage to cohabitation among first partnerships in the period and cohort perspective. The time axis is partitioned into five-year intervals, starting from the birth cohort 1925–29 and the calendar period 1960–64.

The evidence pertaining to historical nuptiality regimes is derived from previous studies. We perform a secondary analysis on these data in order to explore the association between historical and contemporary patterns of family formation.

RESULTS

1. Varying paths to the contemporary pattern of partnership formation

Fig. 1 presents the trends in partnership formation in the period perspective since the early 1960s. Overall, the data reveal a secular shift from direct marriage to cohabitation, but the turning points in the trend and their possible connection to societal context vary.

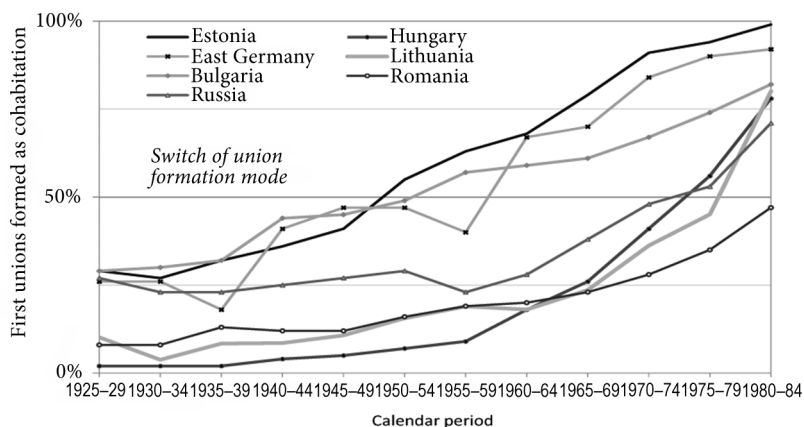


Fig. 1. Proportion of the first union formed as cohabitation, calendar period

Source: GGS database, authors' calculations

In one group of countries, exemplified by East Germany and Estonia, the change in the mode of partnership formation started relatively early, and disregarding fluctuations that likely result from a small sample size, the trend exhibits a steady and relatively steep upward gradient for most of the observation period in both countries. The proportion of first partnerships increases from 23–27% in the early 1960s to levels beyond 90% at the beginning of the

³ To secure greater homogeneity in the study population, the Estonian data are limited to the native population. The reason for doing so relates to a large proportion of immigrant population and distinct demographic patterns in the regions from which the immigrants originate (Katus, Puur and Sakkeus 2000; 2008).

21st century. In the 1960s, Bulgaria featured an even higher proportion of first unions started as cohabitation but the increase in the proportion was modest up to 1990: in 1960–1989, the overall increase did not exceed 16 percentage points, compared to 38 and 47 percentage points in the former GDR and Estonia respectively.

In other countries, the data reveal a clear distinction between the two stages in the mode of partnership formation. The first stage was characterised by a slow change and the persistence of the traditional pattern. In that stage, cohabitation accounted for only 8–25% of first partnerships. In the following stage, the shift from direct marriage to cohabitation accelerated, and with the exception of Romania, cohabitation replaced direct marriage as the prevailing route to union formation.

In this group of countries, the period in which the change in the mode of partnership formation began to accelerate seems to be fairly independent of how traditional partnership patterns initially were. In Hungary, the acceleration occurred between the late 1970s and early 1980s, in Russia it took place in the late 1980s, and in Lithuania it more or less coincided with the onset of societal transformation in the 1990s. In Romania, the changes gained momentum more gradually, and in the early 2000s it was the only country among those included in the analysis in which the majority of first partnerships (56%) were still contracted in the traditional mode.

Fig. 2 illuminates the same trends in the cohort perspective. Although direct marriage represented a prevailing pathway of partnership formation among older cohorts of all the countries, 23–30% of Bulgarian, East German, Estonian and Russian women who were born in the late 1920s and early 1930s entered their first union as non-married cohabitation. In Hungary, Lithuania, and Romania, the proportion is noticeably lower (2–10%) in the same generations.

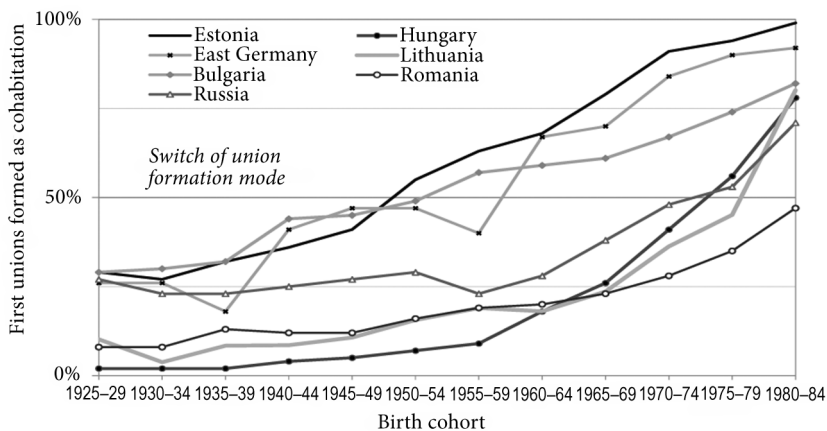


Fig. 2. Proportion of the first union formed as cohabitation, birth cohorts 1925–1984

Source: GGS database, authors' calculations

In the countries of the first group, the dominance of direct marriage started to weaken in the cohorts born in the late 1930s and 1940s. Among these countries, Estonia was the first where cohabitation replaced direct marriage as the main route to family building. In Estonia, the shift occurred among women born in 1950–54. Bulgaria reached a similar point in the

1955–59 cohort and if there were no fluctuations caused by the small sample size, the same would have likely held for East Germany. In the following generations, the entry into partnership through cohabitation grew steadily, particularly in Estonia and East Germany. Even if the reported percentages in the youngest generations may slightly overestimate the decrease in direct marriage, Estonia and East Germany indicate an almost complete shift from marriage to cohabitation. In Bulgaria, the change has been slower in the younger generations⁴.

In Hungary, Lithuania, and Romania, the adherence to the traditional mode of partnership formation persisted longer. As a result, the difference in the pattern of partnership formation between the two groups of countries increased and peaked among women born in the 1960s. In the younger generations, the change accelerated in the second group, particularly for Hungary and Lithuania, reducing the difference.

Cohort analysis draws attention to the peculiarity of developments in Russia. In the older cohorts, the country exhibits a markedly high proportion of partnerships started outside registered marriage. This places Russia among the early adaptors of cohabitation, next to Estonia, East Germany and Bulgaria. Moving towards younger cohorts, however, Russia did not follow the trends characteristic of the latter countries and the proportion of direct marriage and cohabitation stalled. The 1960–64 birth cohort features a proportion only marginally higher than that observed in 1925–29, bringing Russia nearer to the latecomers.

The results are in line with the argument of the SDT theory that the changes at the core of the transition are significant, irreversible and universal (Lesthaeghe 2010). In all the countries included in the study, the shift in the mode of partnership formation constitutes a break with an earlier regime in which registered marriage predominated. Once initiated, the increase in the proportion of unions that began as cohabitation persisted and led to a change, and eventually, to a complete reversal in the ways in which partnerships are contracted.

The results lend further support to the notion that contemporary demographic development is a gradual, multi-stage process, with ‘leaders’ and ‘laggers’ among countries as well as sub-groups of the population. Among the countries included in the analysis, Estonia and East Germany emerge as forerunners in the shift towards a new pattern of partnership formation. In accord with findings from previous studies (Hoem and Kostova 2008), Bulgaria also exhibits some traces of the early SDT. On the other hand, Hungary, Lithuania, Russia and Romania represent latecomers in completing the shift from direct marriage to cohabitation. The findings also support the view, expressed in earlier studies, that the spread of new family patterns began well before the change in the societal regime in the 1990s (e. g. Kantorova 2004; Speder 2005; Stankuniene et al. 2009; Zakharov 2008).

2. Is there a continuity between historical and contemporary patterns of partnership formation?

To verify the main hypothesis of the article, Table presents evidence on nuptiality regimes in the late 19th century and the contemporary patterns of partnership formation in our seven countries.

Consistent with Hajnal’s delineation, Estonia, East Germany and Lithuania feature later ages at first marriage (25.4–26.3 years) and high proportions of never-married women (10–12%). The historical nuptiality regime in these countries conforms to the western European

⁴ Life-table measures indicate that in the birth cohorts of the 1970s, 93% of Estonian and 87% of East German women who had partnered by age 25 started their first union as cohabitation. For Bulgaria, the corresponding proportion was 69%.

Table. Characteristics of contemporary and historical patterns of partnership formation in the countries included in the analysis

	Estonia	East Germany	Lithuania	Hungary	Russia	Bulgaria	Romania
1. Historical pattern (around 1900)							
Mean age at marriage, women, years	26.3	25.5	25.4	22.0	20.9	20.8	20.3
Proportion who never married, women aged 40–49 (%)	12	10	10	4	5	1	3
2. Contemporary pattern							
Proportion of first partnerships started as cohabitation 2000–2004 (%)	96	91	68	65	67	78	44
Period in which entry into cohabitation exceeded direct marriage	1975–1979	1980–1984	2000–2004	1995–1999	1995–1999	1975–1979	After 2005

Sources: Katus (1994); Sklar (1974); Tekse (1969); UN (1990); historical data for Russia were estimated by S. Zakharov and cover 31 provinces (*gubernias*) that were in the European part of the Russian Empire and now belong to the present territory of the Russian Federation.

Note: Countries are ranked according to mean age at marriage (women) around 1900.

nuptiality pattern. In Bulgaria, Hungary, Romania and Russia, the age at marriage ranged between 20.3 and 22 years and the proportion of never married women did not exceed 5%. These parameters are characteristic of the eastern European pattern.

The contemporary pattern of partnership formation is described by the proportion of first partnerships that began as cohabitation in 2000–04 and the calendar period in which cohabitation became the main route to partnership formation. According to both measures, the ranking of individual countries is almost identical, reflecting the advancement of countries from traditional to modern partnership initiation.

The evidence in Table generally supports the hypothesised legacy of historical nuptiality regimes that prevailed in different parts of the EE. On the one hand, the forerunners in the trend towards modern partnership formation, Estonia and East Germany, come from the area west of the Hajnal line, which exhibited late and low prevalence of marriage in the 19th century. On the other hand, the latecomers in this trend tend to be countries east of the Hajnal line, which historically featured relatively early and universal marriage. Thus our findings lend support to the argument on the spatial continuity of successive demographic innovations developed in studies of Western Europe (Lesthaege and Neels 2002; 2006).

The continuity argument is nevertheless challenged by the fact that the correspondence between historical and contemporary patterns is not perfect. In our selection of countries, this is exemplified by Bulgaria and Lithuania. Positioned to the east of the Hajnal line, Bulgaria exhibits a relatively early shift away from direct marriage. The Lithuanian case is opposite to that of Bulgaria. Although Lithuania was historically characterised by late and low prevalence marriage, the country did not experience an early shift from registered marriage to cohabitation in the late 20th century.

We think that both contradictions can be explained by country-specific circumstances. As regards Bulgaria, Koytcheva (2006) has drawn attention to a long-standing and socially accepted tradition that young couples would begin living together, typically in the parental

household, as soon as they were engaged to be married. In the case of Lithuania, a plausible explanation could be sought in the course of the secularisation process and the role of religion in structural and cultural modernisation that were discussed in the earlier parts of the article.

CONCLUDING REMARKS

The sweeping changes in partnership formation that became manifest after 1990 all over Eastern Europe have stimulated research directed towards understanding of forces that determine the advancement of nuptiality regime characteristic of the SDT. This article aimed to explore the link between historical and contemporary patterns of family formation based on the evidence from seven EE countries. The theoretical underpinnings of the study were derived from Hajnal's theory of historical nuptiality regimes in Europe. We have supplemented Hajnal's approach with a developmental perspective that allows for a more nuanced account of historical patterns and underscores the role of contextual factors.

In general, the results suggest that all countries in the region share a common vector of changes in partnership formation, but at the same time the onset and advancement of these changes vary. The changes in partnership formation started earlier and have advanced farther in countries that had experienced the western European marriage pattern in the past. Countries in the areas of the eastern European marriage pattern started the shift from direct marriage to cohabitation later. In these countries, the emergence of a new partnership pattern often coincided with the societal transformation of the 1990s.

Nevertheless, the relationship between demographic past and present was not confirmed for all countries. Despite being located west of the Hajnal line, Lithuania drifted to the group of latecomers with regard to cohabitation, whereas Bulgaria demonstrated signs of a reverse shift. Relying on a developmental perspective, we speculate that both cases can be explained by ideational forces: late secularisation in the case of Lithuania and cultural norms pertaining to marital arrangements in Bulgaria.

On a more general level, our results support the notion that historical and contemporary demographic patterns should not be regarded as completely independent phenomena. Modern social sciences often emphasise the importance of individual agency; individuals can cut ties with traditions and adopt new modes of behaviour that better serve their needs and goals in life. This article reminds us that new behaviours may have historical roots that should not be overlooked in our preoccupation with contemporary developments.

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ALLAN PUUR, AUŠRA MASLAUSKAITĖ, LEEN RAHNU, VLADA STANKŪNIENĖ

Praeities ir dabarties šeimos formavimo modeliai Rytų Europoje: ar J. Hajnal linija vis dar reikšminga?

Santrauka

Straipsnyje tiriamas istorinių ir šiuolaikinių šeimos formavimo modelių ryšys. Teorinės straipsnio prielaidos siejamos su J. Hajnal istorinių santuokos ir namų ūkio režimų Europoje koncepcija. Tyrimas rodo, kad šiuolaikiniai šeimos formavimo modeliai anksčiausiai pradėjo plisti ir labiausiai būdingi šalims, kurios istoriškai priklausė vakarietiškam šeimos formavimo modeliui, o vėliau paplito ir yra mažiau pažengę šalyse, kuriose istoriškai susiklostė rytietiškas šeimos formavimo modelis.

Raktažodžiai: šeimos formavimas, istoriniai santuokos modeliai, Rytų Europa