



DISSERTATIONES PSYCHOLOGICAE UNIVERSITATIS TARTUENSIS

2

**TRANSFORMATION IN ESTONIA  
AS REFLECTED IN FAMILIES:  
INSIGHT INTO SOCIAL STRESS AND  
POVERTY**

**DAGMAR KUTSAR**

TARTU 1995

**DISSERTATIONES PSYCHOLOGICAE UNIVERSITATIS TARTUENSIS**

**TRANSFORMATION IN ESTONIA  
AS REFLECTED IN FAMILIES:  
INSIGHT INTO SOCIAL STRESS AND  
POVERTY**

**DAGMAR KUTSAR**



**TARTU UNIVERSITY  
PRESS**

Department of Psychology, University of Tartu, Tartu, Estonia

Dissertation is accepted for the commencement of the degree of Doctor of Philosophy (in Psychology) on December 15, 1994 by the Doctoral Committee of the Department of Psychology, University of Tartu

Opponents:      Professor Mati Heidmets, Tallinn  
                         Professor Jüri Allik, Tartu

Commencement: February      , 1995

Publication of this dissertation is granted by the Estonian Science Foundation

© Dagmar Kutsar, 1995

Tartu Ülikooli Kirjastuse trükikoda  
Tiigi 78, EE2400 Tartu  
Tellimus nr. 25

## CONTENTS

<b>LIST OF ORIGINAL PUBLICATIONS.....</b>	<b>6</b>
<b>INTRODUCTION.....</b>	<b>7</b>
<b>BACKGROUND OF THE STUDY.....</b>	<b>9</b>
<b>MATERIAL AND METHOD.....</b>	<b>20</b>
<b>RESULTS.....</b>	<b>23</b>
<b>DISCUSSION.....</b>	<b>32</b>
<b>CONCLUSION.....</b>	<b>42</b>
<b>ACKNOWLEDGEMENTS.....</b>	<b>44</b>
<b>REFERENCES.....</b>	<b>45</b>
<b>SUMMARY (IN ESTONIAN).....</b>	<b>53</b>
<b>PUBLICATIONS.....</b>	<b>57</b>
<b>CURRICULUM VITAE.....</b>	<b>171</b>
<b>DISSERTATIONES PSYCHOLOGICAE UNIVERSITATIS TARTUENSIS... </b>	<b>173</b>

## LIST OF ORIGINAL PUBLICATIONS

This thesis is based on the following publications which will be referred to in the text by their respective Roman numerals.

### **STUDY I: MARRIAGE AND FAMILIES IN ESTONIA**

- I. Kutsar D. (1991) Marriage breakdown in Estonia. *Population Research in Finland XXIX*. Helsinki: Väestöliitto, 1991: 73–82.
- II. Kutsar D. (1990) Family development and divorce in Estonia: empirical research. *Family Situation and Policy. Family Problems*, VIII: 8–14. Tartu: Tartu University Press.
- III. Kutsar D. (1990) Couples in an urbanized setting: expectations and reality. *Estonian Population and the Family. Family Problems*, X: 60–81. Tartu: Tartu University Press.

### **STUDY II: PSYCHOLOGICAL COPING AND ADAPTATION WITH TRANSFORMATION**

- IV. Kutsar D. (1994) Social change and stress in Estonia. Submitted for publication in the *Scandinavian Journal of Social Welfare*.
- V. Kutsar D. (1994) Sotsiaalsest stressist ja psühholoogilisest toimetulekust Eestis [On social stress and psychological coping in Estonia]. Submitted for publication in "*Akadeemia*" (in Estonian).

### **STUDY III: SOCIETAL CHANGE AND ECONOMIC SURVIVAL**

- VI. Kutsar D., Trumm A. (1993) Poverty among households in Estonia. *Scandinavian Journal of Social Welfare* 1993, Vol.2, No.3: 128–141.
- VII. Trumm A., Kutsar D., Oja U. (1993) Transformation process in Estonia: A Challenge for social policy. *Yearbook of Population Research in Finland. XXXI*. Helsinki: Väestöliitto, 1993: 104–110.

# INTRODUCTION

The collapse of the Soviet order brought to an end not only a particular type of political and economic system, but a particular type of welfare state as well. New officially recognized phenomena such as unemployment, inequality, and poverty have found fertile soil in the former Soviet republics and in the other socialist countries of Central and Eastern Europe.

The transformation and its consequences in Central and Eastern Europe have great importance for those involved as well as for the developed western countries. The different aspects of reformation are discussed on numerous political meetings and presented at scientific conferences. Several books and articles are published on this issue by eastern and western scholars (Atkinson & Micklewright 1992; Benson & Clay 1992; Deacon 1992; Deacon & Szalai 1990; Ferge & Kolberg 1992; Kultygin 1993; Marody 1992; Marklund 1993; Warzywoda-Kruszynska & Grotowska-Leder 1993). The barriers to transformation have been the focus and some of the scenarios outlined have been negative in tone (Dellenbrant 1993).

Estonia restored her independence in 1991 after fifty years of Soviet occupation. Families in Estonia are exposed to dual transformation processes in the society: transition from a totalitarian to a democratic society and from a planned economy system to a market economy. The multiple impact of this process of transformation is made manifest in the pressures on the people to engage in political, social, economic and psychological re-construction. *Coping with multiple social changes and economic survival are essential tasks for individuals, families and the whole country.*

## GENERAL AIM OF THE STUDY

At times of rapid transformations, the interrelatedness of family and society becomes especially evident and observable. The general aim of the study is to investigate transformation as reflected in families, i.e., *'family-in-a society' under the conditions of rapid societal change in Estonia in 1988–1994.*

*The special aims of the study are:*

1. to analyse families and adult family members as *reflectors of the societal change;*
2. to describe *new family developments, social stress and poverty* as family related social indicators of transformation process in Estonia;
3. to discuss the dual transformation process in Estonia, focusing on its inner weaknesses and resources for the families.

*The analysis will give insights into:*

1. new social, political and economic background of family functioning at the period of multiple societal change in Estonia;
2. dynamics of objective welfare of the households and psychological phenomena accompanying economic survival at the period of transformation;
3. psychological coping with the societal change and subjective well-being as an adaptational outcome;
4. family development, new challenge and perspectives.

## **FRAMEWORKS FOR VIEWING FAMILIES AND SOCIETAL TRANSFORMATION**

The study proceeds from the general standpoints of Thomas and Wilcox (1987) and Morgan (1985) and looks at the family as a mediator between the individual and society where the society is reflected. The '*mediator*' indicates at the active place in this location influencing societal processes as well. Family development, poverty and social stress on their part have roots in the history of the country and present societal processes as well as in the individual life of the family. Whereas the study deals with macroprocesses influencing the families, as well as the economic and psychological state of the families, each investigation proceeds from its own particular methodology and conceptual framework.

*Study I* proceeds from the sociological understanding of families in which '*the family*' is understood as a social institution; a couple is the unit of analysis. References to the author's related studies about interpersonal perception and informal stability are within a *social psychological* conceptual framework. '*The family*' is understood as a small group of interacting persons and a couple is the unit of analysis.

*Study II* uses a social psychological conceptual framework and applies it to stress and coping by Lazarus and Folkman (1984). A single adult member of a household is the unit of analysis.

*Study III* proceeds from the economic framework for viewing families. '*The household*' is understood as a group of economically inter-dependent persons, which carries its personal standards of living and economic status. The household is the unit of analysis.

# BACKGROUND OF THE STUDY

## WHAT IS FAMILY?

People seldom experience confusion when using the term '*family*', and most feel they have a clear idea of what the word means. However, changing structures and functions of the family make it difficult to determine for social scientists.

The conceptualization of family has become of interest during the last years (Arnkil 1994; Clulow 1993; Levin & Trost 1992; Trost 1990a; Trost 1990b; Trost 1988; Trost 1993). Definitions are important to different people for different purposes. Families can be examined from the perspectives of scholars or researchers, policy or law makers, family therapists, or as a family member, etc. While census reports recognize any unit formed through marriage, birth or adoption, or focus on households (identified by the group of people who eat from the same 'fridge', as this criterion has been put colloquially), individuals have their own mental maps of families which can differ between members of the same family group (Clulow 1993).

**1. Family as a legal bond.** The most simple way to define a '*family*' is to proceed from the *legal bond* of marriage (i.e., 'nuclear family' where the couple is in a registered marriage and has children of their own). However, more often people find *unregistered cohabitation* to be the most suitable terminal or permanent form of family. There is no difference between this and the nuclear family of legally confirmed marital partners other than the legal bond. Cohabitation in Estonia has spread as a preparation period for marriage for the younger generation, less as a consciously chosen alternative to marriage. In older generation, after divorce or after the death of one's spouse, people choose cohabitation as an alternative for marriage more often.

There is a large number of childless couples cohabiting without a registered marriage. Thus, the legal contract between the partners justifies them to be a family. Today many children live in single-parent households or with a step-parent. The proportion of people involved in '*non-traditional family forms*' has increased dramatically, so that these days the traditional nuclear family pattern can hardly be said to represent the majority of families (Frude 1991). Cohabiting partners of the same sex are rarely regarded as a family; however, the presence of a child may increase its acceptance (Kutsar, Tiit & Pall 1994b).

Bohannon (1970) has pointed out six different processes that happen during the divorce. He means emotional, legal, economic, co-parental, community and psychic divorce or separation. The psychic divorce means the separation of self from the personality and influence of the ex-spouse. It can take considerable time to exclude the ex-partner from one's family. Even years after the legal event of divorce ex-partners may still regard their former spouse as a family member. A

re-married man may consider his current wife and his child from his previous marriage as *'his family'* but the four of them would not be regarded as a family unit from the outside. From an outsider's point of view, divorced family members rarely are accepted as a family (Kutsar, Tiit & Pall 1994).

2. *Family as a group of interacting persons.* Families also can be defined as *'person supporting networks'* (Dumon 1993). A family unit is an interacting and interdependent group or organization in which each member has a special relationship to the individual but not necessarily with each other. An individual may simultaneously be in two or more families and this may include some people who never interact together (Frude 1991).

The identity of the individual is strongly connected to the self-perception of family membership. Individuals can conceptualize families in their own way, thus from outside one cannot decide what is family for a certain person. For example, for a child of divorce and remarriage the two-core family, with two mothers and two fathers and many siblings, may make sense, or the principle *"new-comers stay outsiders"* can dominate. Individuals could have a variety of conceptualizations of family: for example one for their family of today, one for their family in the past or future. One can also have different perspectives of family generally and of one's own family (Kutsar, Tiit & Pall 1994).

For the purposes of psychological analyses there is a need to establish criteria for family membership that reflect how the individual regards certain other people and relates to them emotionally. Such criteria will allow specific people to be identified as members of the individual's family, whether or not there is a legal tie or common household (Frude 1991). For example, how should we decide whether an adopted child has become a family member? Or one's retired father who needs everyday care or another, who takes care of a young grandchild? Using the legal criterion the child becomes the family member as soon as the relevant papers are signed but the grandfather is a member of the other core family although he spends most of his time taking care of his grandchildren. Some children include pets in their family. They can be key-members of the family (Kutsar, Tiit & Pall 1994; Ziehl 1994).

Using legal and biological criteria to identify who is and who is not a member of an individual's family would lead us to include some people who play little or no part in the individual's social life (e.g. neglected or unknown children, former spouse), and to exclude some who play the most critical role (e.g. cohabiting partners, caring grandparents).

The concept of *'the family'*, due to its complex and controversial context, is proposed to be replaced with the term *'families'* indicating multifunctionality, variety of behaviours, boundaries and types (Ziehl 1994; Nave-Herz 1994). Proceeding from the perspectives of a study, *'family'* as a unit of analysis is sometimes replaced with *'household'* which can be more concretely identified.

## THE FIELD OF FAMILY STUDIES

The question of whether scientific study of the family can be accepted as a separate field of knowledge or could be included in any of a number of different disciplines (e.g., psychology, sociology, education, law, medicine, etc.) has been dealt with by several social scientists (Burr & Leigh 1983; Brown & Kidwell 1982). The main hardships in a decision are connected with the interdisciplinarity of the subject. Burr and Leigh (1983) are of the opinion that *family studies form a separate field of social science but at the same time the family remains the interdisciplinary field of scientific interest.*

Miller, Rollins and Thomas (1982: 851–852) propose that marriage and family phenomena are especially elusive and multifaceted. Research in these areas is sometimes resisted, because the topics are personal, private, or considered to be sacred. It is a sensitive value-laden subject for a researcher. Family issues are familiar and "answers" seem apparent or intuitive. In spite of these obstacles, the discovery and advancement of empirically grounded knowledge about marriages and families is important for its own sake and for its practical benefits to society. While acquiring knowledge is a worthwhile end in itself, it also provides foundations for empirically informed preventive, therapeutic and policy approaches.

## THE METHODOLOGY OF FAMILY STUDIES

The methodology of family studies has been a longlasting topic for scientific discussions (Brown & Kidwell 1982; Larzelere & Klein 1987; Rodman 1980; Schumm 1982). The methodology of family studies has generally been borrowed from the major social science disciplines. There is no single best methodology because of the interdisciplinarity of the subject. Referring to Larzelere and Klein (1987: 125), the family is more micro than other sociological topics and more macro than most other psychological topics.

Family itself is conceptualized as a small group, or as a social institution. In the first case, microscopical study using either a social psychological or micro-sociological perspective will give an insight into the processes and peculiarities inside the family group. For second, the macrosociological perspective will set the family in the field of societal impact. The interrelatedness of family and society leaves micro- and microscopical approaches confronting each other, but yet *complementary and convergent* to some extent.

The study of families has often been accused of being one-sided in that it neglects the domestic life cycle (Ziehl 1994). It may tell us little of the process of family formation and the social context within which born children are raised and the group of individuals is living. Ziehl (1994) stresses that sometimes not family but household can be the starting point of a study. Therefore, the meth-

odology, as a rule, can be framed depending on the particular research situation while studying 'families'.

### DEVELOPMENT OF THEORETICAL THOUGHT IN FAMILY STUDIES

Since the 1950s, several synopses of the creation of family theory have been published proceeding from the *sociological understanding of the family* (Aldous 1970; Berardo 1980; Burr 1973; Burr, Hill, Nye & Reiss 1979a; Christensen 1964; Goode 1959; Hill 1966; Hill & Hansen 1960; Nye 1988; Nye & Berardo 1966; Boss, Doherty, La Rossa, Schumm & Steinmetz 1993; Thomas & Wilcox 1987). In addition to these, there have now been reviews published in the *Journal of Marriage and the Family* (Adams 1988; Broderick 1971; Holman & Burr 1980; Sprey 1988).

Three distinct periods in the development of theoretical thought in the family field, are overviewed by Tiit & Kutsar (1984):

*1. The development of theoretical thought up to 1950.* Systematic family research began at the close of the 19th century and at that time was strongly influenced by Darwin's theory of evolution. The turn of the century saw the spread of social darwinism which maintained that all social phenomena, including a family, undergo an evolution analogous to the evolution taking place in nature.

The first *systematic* studies of the family were conducted by family sociologists at the turn of the century in an effort to document and change the prevailing economic and social conditions. The family was viewed as a social institution and the interface between the family and the problems of society were taken under discussion. Elements of this perspective are still evident in contemporary family sociology.

Burgess (1926), with his paper "The family as a unity of interacting personalities", brought about a conceptual shift in family studies. His article contained several ideas of symbolic interactionism to the study of the family. Burgess suggested that the family be studied as a '*unity of interacting personalities*' (p.5).

Consideration of the family as a context for interaction dominated research in family sociology for several decades, and symbolic interactionism continues as a visible theoretical perspective in family sociology (Holman & Burr 1980).

A considerable part in the conceptual shift was probably played by the rise of social psychology which brought in its wake the social-psychological approach to the problems of the family. Since the family studies took more microscopic focus. From that period, several essential topics from the theoretical point of view can be pointed out: formation of family (Strauss 1947), compatibility of spouses (Kelly 1941), happiness of marriage (Locke 1947), and others.

**2. The period of 'systematic creation of the theory', 1950–1969.** In this period the creation of a family theory became an objective in itself. The first substantial questionnaires were introduced and the information obtained from these was closely studied. A large quantity of empirical material was accumulated, both to describe family at the different stages of its development and to test the hypotheses that had emerged.

In connection with the growing destabilization of the family, happiness of a marriage became especially topical. The studies of divorce and recurrent marriages became widespread. Winch (1958) elaborated a theory of mate selection proceeding from the complementarity of needs.

The most important theoretical work of the period was a survey of the basic theoretical approaches of the fifties and sixties written by Hill and Hansen (1960). Among sociological approaches they emphasized conceptions like '*institutional approach*', '*structural-functional approach*' and '*family development theory*', the most suitable for interpreting family.

An event of great importance was the publication of "Handbook of Marriage and the Family", edited by Christensen (1964). Besides other topics, this book also deals with the basic theoretical approaches to family in the period.

The period between 1950 and 1960 may be considered the time of creating '*small*' theories, but according to the opinion of Klein (1968) and his followers, there was a split between the voluminous empirical material and the level of theoretical explanation which still exists and even deepens.

**3. Family theory from the 1970s.** Holman and Burr (1980) brought forth three main trends of thought that have most influenced the theoretical interpretation of the family in the 1970s. They are the following: interactionism (represented mainly by Turner and Shosid 1976), the trend based on social exchange theory (e.g., Spanier & Lewis 1980) and the trend based on systems' theory (Kantor & Lehr 1975).

The 1970s saw the elaboration of a number of new approaches, e.g. ecological approach (Andrews, Buboltz & Paolucci 1975), purposeful systems (Ackoff & Emery 1972) and synergetics (Haken 1978). But still all these trends remain on the level, being the kind of theories that are "... unpretentious in quality and the level of generalization, close to initial data, easy to test and adjust", as already Merton (1945: 470) stated.

The most notable accomplishment is the two-volume *Contemporary Theories About the Family* (1979a,b), edited by Burr, Hill, Nye & Reiss. The first volume represents 22 substantive areas of family research, 19 contain detailed interrelated sets of propositions generally induced from research findings. In the second volume a group of authors have made an attempt to integrate the represented 22 areas of family research into particular theoretical orientations such as social exchange theory, symbolic interaction, systems theory, conflict theory, and phenomenological theory. Corresponding to critical estimation of Thomas and Wil-

cox (1987), the result remains on the level of conceptual frameworks or, synonymously, on the level of theoretical perspectives.

*The 1980s and early 1990s*, traditional positivistic thinking was opposed to the softness of many variables (f.e. 'attitude', 'behaviour', 'expectation', etc); the absolute verification was opposed to self-report measures, the positivist or objectivist method to subjectivist or antipositivist method.

The main question has been set by Grotevant and Carlson (1989: 6): "What we know about families is largely determined by how we know what we know". Explanation is almost always on a proximate level, Sprey (1988: 879) concludes. This is not only a methodological question, it touches all theoretical rethinking of family research. In the past decade, the study of the family has become an even more interdisciplinary enterprise than earlier. Theoretical perspectives on the family are diverse, with no theoretical consensus in the field.

The basic thesis of Thomas and Wilcox (1987), the supporters of the radical and critical approaches in social science, is, that in form and content, family theory is an instance of mainstream sociological theory, which is in large measure shaped by the positivist heritage in Western thought. What has not been done is to assess theory in the family field as it relates to the social sciences in general. They suggest to draw attention at hermeneutics which comes to family research through critical theory perspective from the social sciences. "Hermeneutics in social sciences — the term is used to identify this central concern about interpretation of meaning. In the social world, meaning is understood or apprehended from the social context before individual bits of behavior are defined or understood", Thomas and Wilcox (1987: 81) declare. The intention, then, is to identify and describe trends, make sense of the past on the basis of what we know about the present and, if reasonable, project them into the future (Cherlin 1981).

Referring to Habermas (1971: 311–317), the critique of positivism from the critical theory perspective insists on a knowledge duality by arguing that, unlike in the physical sciences, understanding, not only causal explanation, is the goal of the human sciences. Only by focusing on the knower can one begin to understand intentional behaviour and human choice, which are fundamental to an understanding of the human conditions. Theory and practice are not separate, but inseparably joined.

Adams (1988: 14–15) in his review article sets further goals of "crossing boundaries" in family studies. The first boundary to cross which has had the greatest progress, is the historical understanding of the family, the other crossings that seem appropriate are theoretical, cross-disciplinary, cross-institutional, and cross-cultural. More work on the relations between the family and other institutions would help to elucidate family-in-society. "In 50 years of research we have only begun the task of understanding family life", he concludes.

## FAMILY STUDIES IN ESTONIA

Families in Estonia besides their traditional functions of reproduction, socialization, recreation and economic management have been a significant agent of carrying people's social memory and preservation of ethnic identity in occupied Estonia. In the situation of social transformation, families take an active part in supporting their members as they cope economically as well as psychologically with multiple societal change.

Families have been the interdisciplinary field of scientific interest for sociologists, social psychologists, educational scientists, psychiatrists, and other specialists. Concrete investigations focusing on different aspects of family life, have been carried out under the roof of sociology, at the same time integrating knowledge from psychology, economics, law, educational science and other disciplines.

Developing relatively independently from the rising field of sociology and because of the specificity of the subject, family studies have been subjected to less ideological oppression in comparison to the other social sciences in Estonia. However, the field of family studies has been disproportionately covered with separate studies. For example, the topics concerning premarital sexual behaviour and other sexual matters, relationships between different nationalities and the problems of nationally mixed families, estimations about economic wealth and personal politics were preferably not investigated, and not taken under scientific discussions.

Family studies in Estonia, mainly within the sociological orientation, followed the methodology elaborated by the outstanding family sociologists in the former Soviet Union. The state of being oriented in the western theoretical frameworks of the researchers was dependent on the availability of respective literature, therefore, rather limited.

Today, growing from the empirical analysis of the inner peculiarities of family functioning, family studies have received much attention from social politicians and become the topic for political discussions.

*The Unit of Family Studies at University of Tartu* was founded in the autumn of 1968. At present the unit belongs to the Department of Sociology.

The Unit of Family Studies of University of Tartu is known by its longitudinal and comparative studies. Already in 1970, the scientific tutor of the group, Ene-Margit Tiit, professor of mathematical statistics, built up contact with Finnish family sociologists and their outstanding representative, Elina Haavio-Mannila, a professor of sociology in Helsinki University. Very soon the first comparative study on students' expectations about the ideal spouse and marriage was carried out in Estonia and Finland and repeated in 1989 (Tiit 1990c; Haavio-Mannila, Lammi & Tiit 1990).

At present the researchers of the group have scientific cooperation with several centres of family and welfare studies in Finland, Sweden and Norway. The unit received positive international evaluation by Swedish colleagues in 1992.

The major projects of the unit are as following:

1. *The project "Family"*. The aim of the project was to ascertain the reasons for the low quality and instability of marriages in the former Estonian SSR. It covered people who planned to marry (1150 respondents), people undergoing divorce (950 respondents), and people who had been married for five years (540 respondents). The respective publications deal with formation of families in Estonia and risk factors of stability (Kutsar & Tiit 1980; Kutsar & Tiit 1982; Tiit, Tavit, Kutsar & Keerberg 1982).
2. *The creation of a model of family development and breaking up*. The special interest of the author of the current study has been turned to creation of the model of informal stability of conjugal relationships. The author has focused on the social-psychological processes of the family functioning: interpersonal perception of character features proceeding from the mutual and self-estimations of future spouses, young couples and people undergoing divorce (Kutsar 1991a,b; 1990d; 1987; 1982; 1980). Variables indicating quality and informal stability (inner prosperity) of marriage relationships are presented in the publications (Kutsar 1990b,c,d; 1988b; 1987; 1984; Kutsar & Tiit 1982; 1980). The impact of societal macroprocesses influencing inner prosperity of marriage relationships are taken under discussion in the publications (Kutsar 1991c; 1990a; 1988a). The family political issues are discussed in (Tiit & Kutsar 1990a,b).
3. *Households in the period of transformation*. The umbrella project of the unit contains investigations about economic and psychological coping with multiple societal change (Kutsar 1994; Kutsar & Trumm 1994a,b; Kutsar & Trumm 1993; Trumm, Kutsar & Oja 1993).

### FAMILIES AND SOCIETAL CHANGE

Family, either in a traditional meaning as a social institution or as a small group of interacting persons, is one of the most complex social phenomena. It is affected by psychological dynamics, biological processes, socio-political decisions of the government, economic conditions, ecological problems, demographic and long-term historical change.

Family is not static and homogeneous, it joins together different generations, ages, genders and functions. It has its own history and traditions, and it is highly regulated by norms. "The family is a process, involving varying relationships and configurations of family members that change over the life course", Hareven (1987: 37) states.

Families are intimately embedded in a larger societal context; they serve as mediator between individuals and the social forces on one hand, and institutions affecting them on another. Family has both facilitated the adaptation of individuals to social change and initiated change itself (Cox 1994; Hareven 1987; Larzelere & Klein 1987).

At all levels of society change generates uncertainty. Continuity and stability in family relations are likely to be helpful in managing change at all levels of life. To cite Clulow (1993: 272–273), *"in post-welfare societies the family unit is likely to become increasingly important as a social resource, a fact that is unlikely to sit easily with the values of individualism which currently shape personal aspirations and economic thinking"*. And Marsan (1994: 4) continues: *"... more than any other system the family does legitimately and inevitably reflect and perhaps even anticipate the changes which are on the way"*.

### SOCIETAL CHANGE IN ESTONIA

During the Soviet occupation of 1940–1991, Moscow controlled more than 90% of Estonian industry. In the late 1980s, the national economy reached a crisis. The demand for goods and services outstripped the supply, average prices went up and the purchasing power of the rouble decreased enormously. In the early 1990s, fear of the forthcoming monetary reform and accelerating inflation caused panic, and people began to withdraw money from their bank accounts and hoard everyday consumer goods. The rouble suffered from the growing inflation, the standard of living fell and the cost of living increased.

During the period of transition from a Soviet republic into an independent country (1990–1992) Estonia remained in the sphere of influence of the rouble and the Soviet economy until the monetary reform in June 1992 took place. Current re-construction of the economy still has not reached the normal level and structure of production. Low wages, unemployment, and lack of social guarantees have caused *'poverty'* and *'economic survival'* to be the central themes for many individuals and households.

From 1989 until the monetary reform in 1992 the total inflation rate constituted 4000%. The introduction of the national currency *'kroon'* stopped the rapid growth of inflation. Today the inflation constitutes around 4–5% per month (Figure 1). The monetary reform provided more financial security for the Estonian people and enabled them to become independent from the Soviet economy.

Since 1989, industrial production in Estonia has been reduced by almost 67%. Gross domestic product (GDP) during the same period has decreased by 40% (Noorkõiv & Annus 1994: 13). Regression in production has caused changes in the employment rates. Employment rate in 1989 was 51.8% , among the population, in January 1994 it was 43.4% (Noorkõiv & Annus 1994: 11–12). Now the unemployment rate constitutes 1.9% from the total population of working age.

However, by the estimations of the experts, the actual unemployment rate is higher due to the hidden (unregistered) unemployment. According to the most pessimistic estimations the unemployment rate possibly reaches 7–8%. Unemployment in Estonia has a structural and regional character, being the highest among less educated people of pre-retirement age and in the Eastern and Southern rural areas.

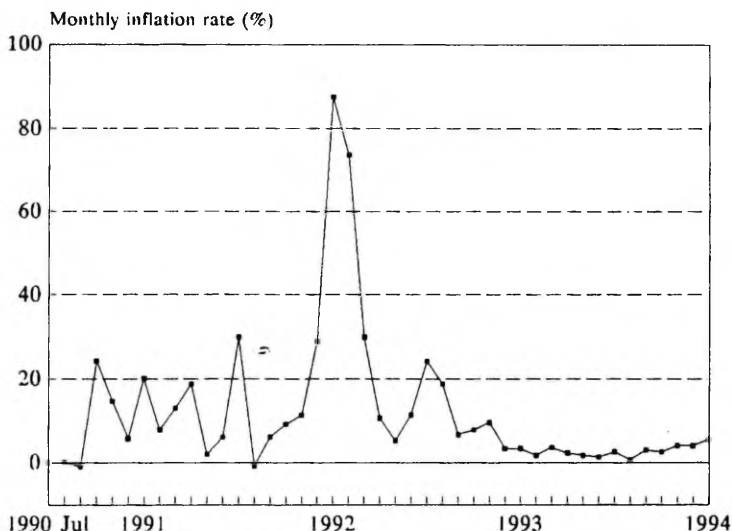


Figure 1. Dynamics of the consumer price index in Estonia in the period from June 1990 to January 1994.

A failure of the social security system has complicated coping with everyday life of people living on welfare (the retired, disabled, single mothers, young families with little children, students etc.), reduction of social benefits and services is related to the lack of funding to keep benefit levels adjusted to the rate of inflation and, in some cases, to the restrictions in the social welfare system.

Before the reconstruction started, housing expenditure had been relatively low because housing costs had been largely financed by government subsidies. Low-cost, low-quality housing dominated the picture. Food prices were kept low with the help of state donation. Prices of consumer goods had been considerably higher because of a high sales tax. The characteristic feature of the reconstruction of the national economy is the liberal price reform which is aimed at equalizing the level of prices to the world level. All the state subsidies for food, housing and other everyday goods have been eliminated. As a result, the existing price structure is totally transformed.

Rapid decrease in production, inflation, and unemployment, all processes characteristic of the first stage of the societal transition, have cut down material resources of the people. In the period 1991–1993 the purchasing power was reduced by 32.5%, on the average. Decrease of the living standard and price reform has influenced the consumer behaviour of households (Figure 2).

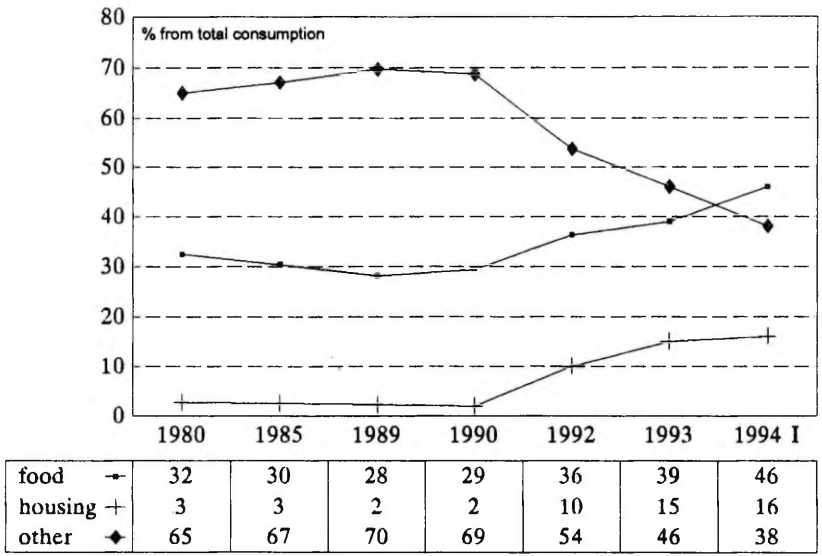


Figure 2. The consumption structure of households in the period from 1980 to 1994.

The multiple impact of this process of transformation is made manifest in the pressures on the people to engage in political, social and economic restructuring, pressures which demand the ability to adapt to change and to re-construct personal identity. Changes on the societal level lead to the development of new patterns of interpersonal relationships: competition for the inadequate supply of jobs, the increasing role of monetary relations among people, an increasing need to be able to fight for one's way of life. New situations create new demands for everybody which require a readiness to further one's knowledge and skills; everyone is expected to have an enterprising spirit in a big way scale.

Competing explanations of events in the mass media make the future less clear-cut and this, in turn, increases tensions among people. Unrealistic social expectations create social myths, feelings of personal failure, distrust of the intentions and decisions of the authorities. When the myths break down, the result is a loss of faith in the possibility of further national developments.

# MATERIAL AND METHOD

## STUDY I: MARRIAGE AND FAMILIES IN ESTONIA

The first investigation [paper I] analyses the instability of marriages in Estonia using data about divorce rate from 1988. The year 1988 is significant for Estonian society as the first year of the national re-awakening. Therefore, the study serves as baseline for the further investigations about the transformation reflected in the families.

The statistical data about divorces come from the Estonian Republican Registrar's Department, from Civil Censuses and from various collections of statistical data.

Divorce is defined as the dissolving of a socially and legally recognized arrangement. The number of divorces is the number of divorces registered at the Registrar's Offices. If a couple has no children or no arguments, they get divorced there and their divorce is registered automatically. If a couple does have children and/or disagreements, they have to go through a judicial process. Only after the registration of the divorce in the Registrar's Office is one's marriage legally dissolved. The divorce is included in the divorce statistics of the year when it has been registered.

Thus, the divorce rate of the certain year is an approximate indicator of marriage breakdown. This number does not include all the people who get divorced in the courts; it does not include the persons who have separated and those whose marriage has actually ended.

The divorce rate is counted per 100 marriages concluded in the same year and by 1.000 inhabitants. The divorce rate that is counted per 100 marriages has been valid since the number of new marriages has been on a level of about 12 thousand per year. At present, the number of marriage contracts has sufficiently dropped.

To uncover the process of marriage breakdown in Estonia the following studies are included:

- \* an overview about the studies of family formation, development and informal stability of conjugal relationships (the samples of 1150 future spouses (1972); 540 married couples (1978); 950 divorcees (1975) and 470 married couples (1978)) [paper II]. References to the related studies about social psychological regularities of interpersonal perception of spouses and factors determining informal stability of marriages give a dynamic overview about the families as agents in a transforming society.
- \* analysis of conjugal relationships and how they are influenced by urbanization, women's work participation and unbalanced family functions (the sample of 540 married couples, 1978) [paper III].

## STUDY II: SOCIAL CHANGE AND STRESS

Social stress is created by the rapid social, political, and economic changes when the people's ability to cope with the new situations are put to the test. The phenomenon of social stress becomes subjectively observable when a person feels his/her life to be influenced by the events on a societal level, when endangers the perceived control over his/her own life situations.

The papers [IV, V] aim at investigation of reflection of multiple social change on the people's cognitive and affective state. The special aim is to find the factors determining well-being of an individual. 'Well-being' is understood as the perceived opportunities for needs satisfaction of an individual.

A questionnaire to investigate social stress was created also applying some statements from the interview project, "*Self-concept over the life-span*", developed by the researchers from the Institute for Social Research, University of Michigan in 1991.

The questionnaire consists of two parts and the items are measured on a Likert type scale. The first part is formed from 15 statements which people sometimes make about themselves. The respondents were asked to tell how much they agreed or disagreed with each statement ("strongly agree", "somewhat agree", "somewhat disagree" and "strongly disagree"). The second part is formed from eleven statements describing how people sometimes feel. The respondents were asked to tell how often they had felt that way during the last two weeks ("most of the time", "some of the time", "hardly ever", "never").

The current investigation has been included into the umbrella project of the state statistics "*Estonian Household Budget Survey*". The household monitoring, which is carried out every month by Estonian Market and Opinion Research (EMOR Ltd.) involved 809 adult household members (349 men and 460 women) in the survey in March/April 1993.

A hypothesized model of social stress based on the stress and coping model of Lazarus and Folkman (1984) and Borden (1991) is applied as a frame of reference for the investigation. The antecedent variables are multiple social change, gender, age and nationality. The mediating processes are appraisal and coping. The adaptational outcome is psychological well-being. Special attention is paid to the group of people with higher levels of social distress.

## STUDY III: POVERTY AMONG HOUSEHOLDS

In 1991 the method of household budgets was developed by the Unit of Family Studies at Tartu University on a contract basis with Estonian Market and Opinion Research (EMOR Ltd.). The data are collected by EMOR Ltd. and turned over to the Estonian Statistics Authority. The sample is corrected every quarter and renewed every year. An adult member of the household as a contact person

in the survey writes down all the income and expenditure in the household for each day during one month. The household is defined as a group of people living together (*'sharing common shelter'*) and having a joint budget (*'using common fridge'*).

The investigation [paper VI] focuses on the data about the household group surveyed in May and August 1992; altogether questioned twice were 239 households. The indication of poverty is concluded by comparison of different poverty lines which are known by home economics and social policy literature as well as used in Estonia at different times. The study points out the problems of social exclusion and deprivation among responding households, societal as well as subjective hardships complicating the economic survival of the households.

The data about 419 households monitored in January 1993 [paper VII] is included for the perspective of socio-political discussions. The study focuses on the new tasks and responsibilities of social policy in a situation of deep economic depression.

Poverty lines are calculated based on income using the following formula (Uusitalo 1992: 20):

$$\begin{array}{r}
 \textit{Factor income} \\
 + \textit{Public sector transfer payments} \\
 \hline
 = \textit{Gross income} \\
 - \textit{Income taxes} \\
 \hline
 = \textit{Disposable income}
 \end{array}$$

Economic welfare is dependent on the size and structure of the household. For elimination of this impact the method of consumption units is needed. A *consumption unit* is determined using the OECD (Organization of Economic and Co-operation Development) scale. OECD concept of consumption unit (equivalence scale) proceeds from the fact of cohabitation (*household*). The first adult has the value 1.0, each other adult, 0.7, and children, 0.5 (Uusitalo 1992: 17). Disposable income calculated on the basis of OECD equivalence scale forms *household disposable equivalent income*.

*The poverty lines are calculated:*

1. by the line differentiating families for sociopolitical and administrative decisions;
2. at 50% of the median disposable income (Uusitalo 1989);
3. at 50% of the median consumption (Eurostat 1990);
4. through expenditure on food (Zimmerman & Chilman 1988).

The poverty lines calculated per household member and per OECD consumption unit are compared.

# RESULTS

## STUDY I: MARRIAGE AND FAMILIES IN ESTONIA

The situation of families in Estonia can be characterized by only one fact: the divorce rate, beginning its rise from the late 1960s, has been 45–48% from the number of marriage contracts per year during last ten years up to the revised year 1988. That means, about 60–65% of marriages which are legally concluded, end in divorce. The high divorce rate is not a problem in itself but it is a problem in the sense of indication of the dysfunctioning of the marriage and the factors determining it.

The investigation [paper I] reveals the first four years of marriage to be the most dangerous for the stability of marriage. According to the data for 1988, 32% of marriages ending in divorce in cities and 30% in the country last about four years. The tenth anniversary is not reached by 59% of marriages in cities, 55% in the countryside.

The average length of marriage in towns is 6.6 years and in the rural areas, 7.5 years. First marriage and remarriage do not differ notably in stability; remarriages break up with the same probability as first marriages. For second marriages, the first two years of marriage are the most dangerous; compared to about 15% of first marriages, nearly one-third of the remarrieds separate. According to the data from 1988, about 40% of the divorced have no dependent children. More than 75% of applications for divorce are handled by wives, nearly three fourths of whom are under 40 years of age, and of a fertile age with every possibility to contract a remarriage.

The increase in the number of remarriages has been higher than the rise in the divorce rate while remarriages still stay a typical urban phenomenon. The divorce rate is higher in the urban areas and lower in the rural areas; it is higher in the regions with high immigration rates and the lowest in the Estonian islands and other ancient Estonian areas with a low immigration and industrialization level. Cohabitation is gaining popularity, the number of first marriages is decreasing, i.e. behind the apparent stabilization of the divorce rate, an increasing variability of family formation is taking place. The high frequency of divorce has created a liberal attitude towards the divorced which encourages them to remarry.

The investigation [paper II] overviewing formation, development and breakdown of conjugal relationships, has revealed some regularities determining instability of marriages in Estonia.

*1. Quality of spouses' relationships and informal stability of marriage* [paper II; Kutsar 1990b,c,d; 1988b]. The study is based on the survey of 540 married couples in Estonia (1978) and proceeds from Lewis and Spanier's

(1979) theoretical framework of quality and stability of marital relationships. Index of Quality of Spouses' Relationships is formed from the estimates of mutual closeness. Some other indexes of the pair on the ground of more influential upon the spouses' interrelationships parameters are formed that gather into the determinants of the quality of conjugal relations and the informal stability of the marital bond. The Regression Analysis is processed (Figure 3).

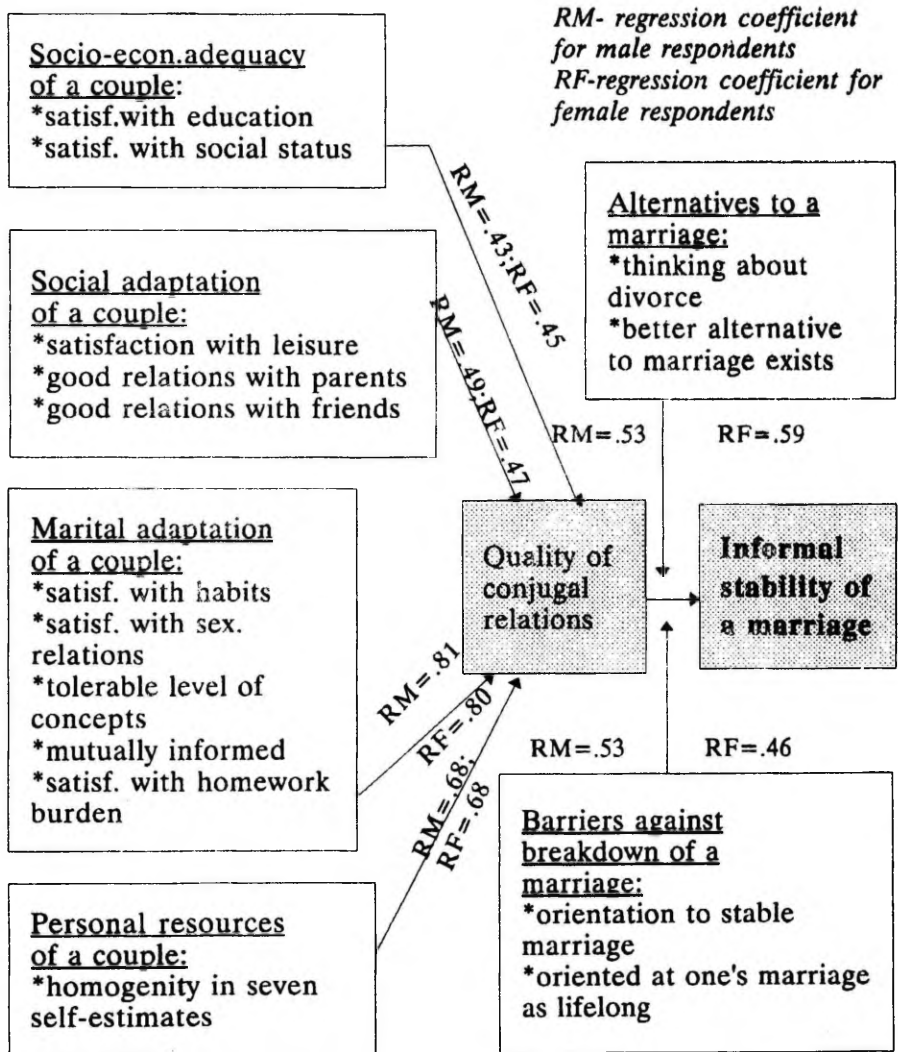


Figure 3. The empirical model of informal stability of marriage in Estonia (Regression analysis)

The informal stability of one's marriage is determined by the perceived quality of spouses' relationships, the subjective evaluation of the probability of marriage breaking up, and perceived alternatives to marriage (Lewis & Spanier 1979; Figure 3). The subjective evaluation of the informal prosperity of one's marriage in a great deal determines one's behaviour pattern in a conflict situation (Figure 4; Kutsar 1991b).

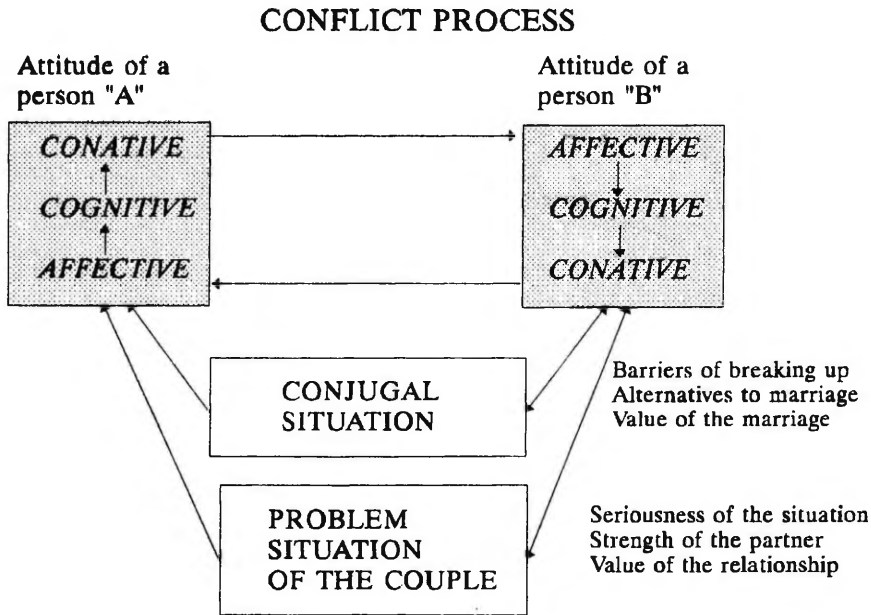


Figure 4. A Conflict process changing social attitude of a couple (Kutsar 1991b).

*The main social reasons* for the high divorce rate have been rapid urbanization and industrialization, high women's employment rate, and an imbalance in family functions due to low economic level of society [paper III].

- \* *Industrialization and urbanization.* Estonia is characterized by an increasingly high level of urbanization. In 1960 the urban population of the republic made up 57% of the whole population, and in 1970, 65%, and in 1989, 72%. The centres of collective and state farms had obtained quite an urban look with some features characterizing the urban way of life as a result of official population and economy policy.
- \* *Work participation of mothers.* The high level of women's participation in the labor force was forced by the Soviet system where both genders had to participate in society equally. As a result, Soviet women achieved much economical and psychological independence as well as self-awareness for resolv-

ing family crisis situations. Already by the 1979 census, 96% of women capable of work were engaged outside home. Such a high women's employment rate has not been the result of free choice: it has been a result of general policy that all who were able to had to be engaged in work; staying at home was condemned morally in the former Soviet society. This caused children at an early age to attend preschool institutions. Emancipation and individualization of all the family members, as well as the problem of keeping psychological closeness among the family members alive, increases the risk of marriage breakdown.

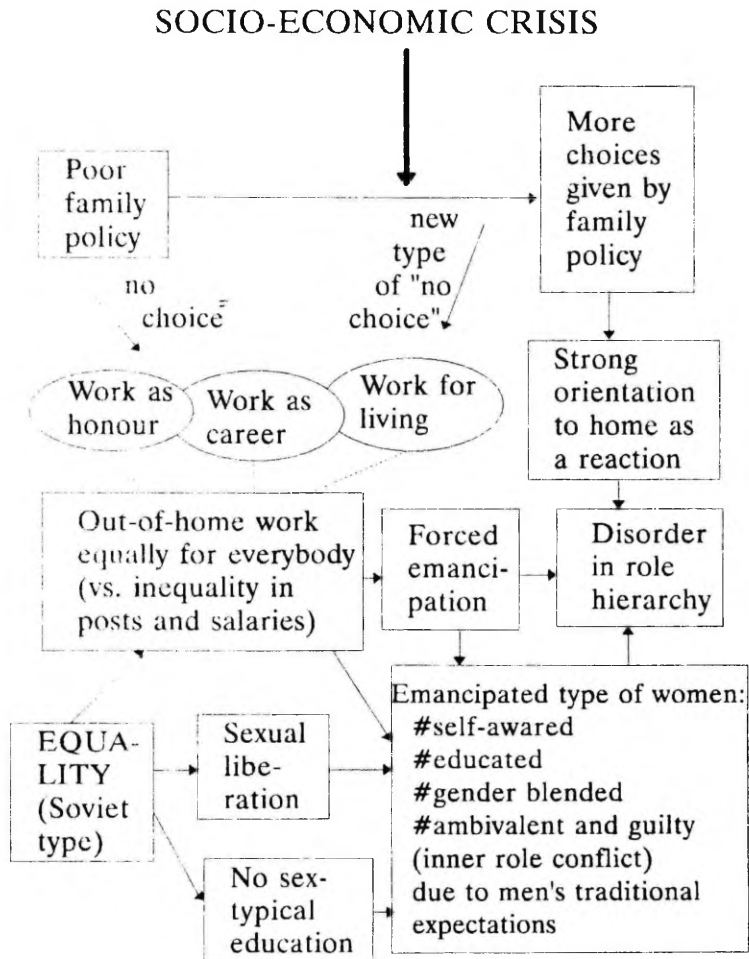


Figure 5. "Over-emancipation" of Estonian women: the Soviet case of equality

Contrary to the official attitude towards out-of-home employment, Estonian women did not agree with such emancipation. Since the beginning of the 1970s, when a questionnaire about students' ideal marriage and a spouse was carried out among the students of Tartu and Helsinki University, 90% of the Estonian female respondents in Tartu, preferred to have an opportunity for part-time work, yet only 20% did so in Helsinki (Tiit & Haavio-Mannila 1981; Pleer, Tammjärv & Tammjärv 1990). Women's 'forced emancipation' in the former Soviet society has caused disorder in the hierarchy of roles of a woman (Figure 5; Kutsar 1991c).

- \* *Unbalance of family functions.* One of the reasons for low stability of marriages in Estonia is connected with the unbalance of family functioning (Tiit & Kutsar 1990a,b). Due to the low economic level of the society, the economic function of the family is needing a lot of time and resources from the family. Empirical data from the survey involving 1200 families with children carried out by the Unit of Family Studies of University of Tartu in 1987, demonstrates that during free days and vacations, spouses deal with different houseworks: they repair flats, cars, sew, do other service works for the family. They have little time for rest. Many families have not enough time or energy to develop their children or to spend time together (Tiit 1990b). On this basis the process of alienation between the family members and danger of marriage breakdown comes evident.

## 2. *Changing social attitudes and interaction patterns of spouses* [paper II].

The project is aimed at revealing social psychological processes influencing stability of marriage. The investigation involves 1150 future spouses, 540 married couples after their five years of marriage (repeated questioning) and 950 divorcing persons. Thirty two bipolar self- and mutual character estimations of people to marry, conjugal and divorcing spouses are measured and analyzed in comparison. (Kutsar 1991b).

The analysis reveals seven bipolar personality features (honest-dishonest; tactful-tactless; affectionate-heartless; conscientious-unconscientious; trustful-distrustful; friendly-unfriendly; orderly-disorderly) that are good indicators of the conjugal atmosphere. The *Index of Marital Success* is formed to differentiate the conjugal atmosphere as 'successful' or 'unsuccessful'.

People intending to marry are mutually benevolent and ready for interaction. They are emotionally close to each other and mutually tolerant. As a rule, the estimation of the future spouse is highly positive and it exceeds the self-estimation of the respondent (Figure 6). Divorcees make up an opposite group. In the marriages on the verge of break up most often the nucleus of marriage - benevolent relations between spouses — is destroyed. Then both spouses express mutual distrust. The tolerance at the beginning of one's marriage is replaced with the intolerance towards the spouse. The spouse is estimated far more negatively

than the respondent about himself/herself does. The young couples are divided into two groups in accordance to the Index of Marital Success. Spouses of 'successful' marriages maintain positive attitude towards their partners, 'unsuccessful' ones start to approach the divorcing couples in their estimations and mutual understanding (Kutsar 1991b).

It is concluded that the perceptive image of the spouse is formed by the value estimations of the person which is made by the other spouse. The value estimations, taken together, express a social attitude towards the spouse which regulates the interaction with him/her. The perceptive image changes together with the changing pattern of interaction (Kutsar 1991b; Figure 6).

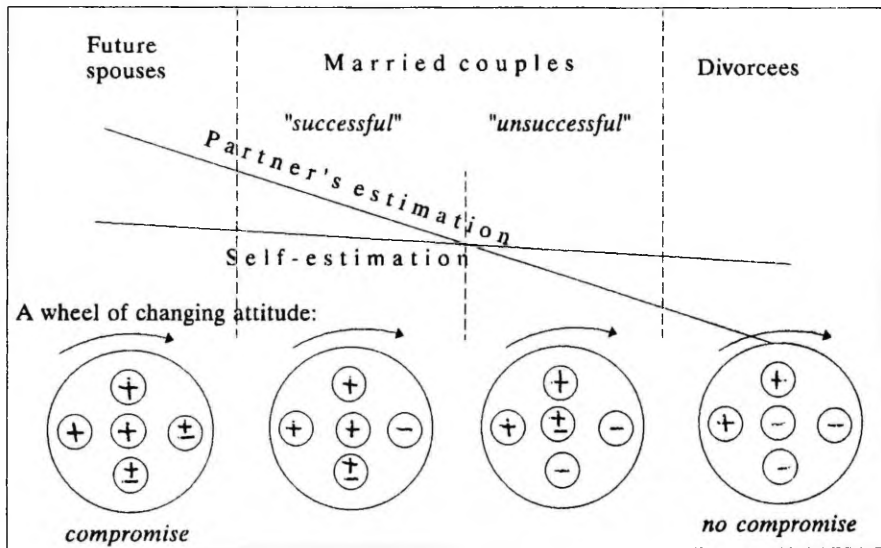


Figure 6. Partner's estimation and self-estimation of 'future spouses', 'successful' and 'unsuccessful' couples and 'divorcees' (an abstraction).

**In summary**, the couples' personal characteristics, interpersonal perception processes, personal values and attitudes play an important role in changing conjugal relationships and stability of marriages in Estonia. Industrialization, urbanization, women's labour force participation and unbalanced family functions create a fertile soil for alienation processes between the family members. Every factor mentioned above continues to influence the stability of conjugal relationships at the time of transformation in Estonia. In the situation of increased outer stresses the existence of a supportive family network promotes adaptation to negative life events (loss of a job, loss of a permanent income, etc). The inner weaknesses of the marital bond become more evident and the danger of marriage breakdown increases.

## STUDY II: SOCIAL STRESS IN ESTONIA

A change in any society includes processes of innovation, adoption and resistance. When the transitions are rapid, these processes overlap, and predicting the future is especially difficult (Settles 1987). Recent five years have been an extraordinary time of transformations for people in Estonia. Changing political, economic, as well as social system produces insecurity and uncertainty feelings of people and sets forward coping as the central point determining subjective well-being. New demands, new relationships between people, arising new social problems, formation of a new life philosophy remind us of Toffler's "future shock" (Toffler 1970). Multiple social change tests a person's abilities to reconstruct the situation, one's self-identification and coping skills. Officially recognized social problems, such as unemployment, inequality, poverty, etc., reveal inner weaknesses of people to meet new challenges, to disclose the legacy of socialism and the totalitarian system.

The present study [papers IV and V] seeks to address issues such as how people in Estonia are reacting to this massive change and what they feel while coping with the new life situations. Who is at greatest risk of psychological survival, who can welcome the social changes as attractive challenge?

The implicit assumption, consistent with biological stress models, is that the respondent's stress follows from external demands. The *gender, age and nationality* of a respondent serve as *differentiating variables* of cognitive appraisal and the ability to cope with social stress [paper IV: Figure 1].

*Social changes* are understood as *stressors* that are appraised as more or less challenging. Differences in appraisal of change lead to varying degrees of stress. In accordance with the hypothesized model, *appraisal and coping* with the social change result in the perception of the situation as threatening or stimulating for the actor's adaptational outcome.

Coping strategies have been conceptualized as *problem-focused* when the goal is to change stressor conditions and *emotion-focused* when the goal is to relieve the emotional impact of stress (Borden 1991; Lazarus & Folkman 1984; Monat & Lazarus 1985).

The concept of *psychological well-being* is seen as an *indicator of adaptational outcome* (Larson 1978). The levels of psychological well-being are determined in varying degrees by the perception and construction of multiple social change as challenging and by a future orientation. Reliance on emotion-focused and problem-focused strategies differentiates the respondents by the levels of psychological well-being, on the assumption that well-being acknowledges the possibilities as well as limitations for action in the context of social change.

This study verified that respondents reporting higher levels of distress more frequently exhibit coping strategies characterized by a *negative focus* and by *wishful thinking*. The failure to respond to the demands of new social situations reflect negatively on the person's psychological well-being. The respondents re-

porting lower levels of distress rely more frequently on coping strategies characterized by a *positive focus* and by *problem solving*. Stressful events are seen as offering new perspectives and exciting challenges for their lives. This, in turn, leads to higher levels of psychological well-being.

The *cluster analysis* reveals an at-risk group of people with higher levels of distress. They constitute 41% of the male and 30% of the female samples. They tend more often to be the respondents from the older age groups and of non-Estonian origin. The less distressed group constitutes 59% of the male sample and 30% of the female sample. More often, they are the respondents from the younger age groups and those of Estonian nationality.

The results of the study have been interpreted as following:

1. *The higher level of distress of the older respondents* is connected with their slowing socialization process, hardships in changing their habitual way of life, re-orienting to a new job, meeting new demands in the situation where development of Estonia favours young people. Social myths of people of older age are positive in their context and more concrete because of proceeding from their own experience in the past; on the other hand, breaking of a social myth is more painful for an older person because there is not so much time left for waiting for the improvement of the situation.
2. *The higher levels of distress of the respondents of non-Estonian origin* is connected with the specificity of the transformation process in Estonia. It is the time of re-construction of the national state of Estonians which can easily create extra burden of tensions to the non-Estonian population leaving them in the positions of outsiders. Due to the lack of authentic information (many of them cannot speak and understand the Estonian language), the social expectations while turning into social myths have negative context and support the role of an outsider enabling alienation processes from the society. Social myths of many non-Estonians decrease cognitive control over the new life situations and increase the levels of social distress.

### **STUDY III: POVERTY AMONG HOUSEHOLDS**

The meaning as well as the measures of '*poverty*' are by no means universally accepted by different researchers. One can argue that the most vital and argued concepts of poverty in the European academic discussion are those of subsistence (poverty) and relative deprivation. The essential differences between these concepts are most explicit in their consequences for social policy. Subsistence poverty tends to refer to the societal goal to ensure resources for the level of consumption which enables citizens to avoid exclusion from the society. The relative deprivation approach leads to policy that guarantees the level of income which enables full participation in the average life styles and customs of the society.

The strategy aimed at avoidance of relative deprivation stresses the output factor of need-satisfaction fulfilment when the competing concept underlines the minimum consumption side (Heikkilä 1990: 36).

The study [paper VI] examines living standards and poverty in Estonia from the 1920's and focuses on 1992. The year 1992 is the first year of independence after the Soviet occupation. The study asks a question, where the poverty line can be set and how many households are below the poverty level. Various definitions of poverty level are discussed. The conclusion is that to set the poverty line at 50% median income or 50% median expenditure is not principally different from the statement that everybody can spend what he has. Since wages are low, the relative poverty line is also low. In the case of Estonia, the structure of total expenditures and the expenditure on food would be better starting points of international comparisons and more reasonable indicators of relative poverty [p. 141]. Empirical evidence is given that single-earner household and households with three or more children face the danger of falling into deep poverty. The poverty among Estonian households reveals a skewed expenditure structure that indicates exclusion from a consumption-centered way of life.

The study [paper VII] monitors the economic situation of households in 1993 and concentrates on a discussion about new challenge in social policy. The study discusses the socio-political dilemma, how to meet the interests of the helpless without making any damage to the enterprising spirit of the economically successful people and economic progress in general.

*In conclusion*, the transformation process in Estonian society uncovers new problems for individuals and households, new tasks, responsibilities and perspectives for social policy in the elaboration of social guarantees. At the period of rapid changes the interrelatedness of the individual and society and the mediator role of the family and household between the two, become extremely evident. Not only the individual but the whole household has to cope with the loss of a family member's job; the whole household must relate to the conditions of decreasing incomes, and the overall decrease of subjective and objective welfare. The study verifies that changing the entire political, economic and social system in a society is difficult. And if the changes are to be brought about simultaneously, the situation becomes nearly insoluble, as Dellenbrant (1993) in his article about transformation in East and Central Europe concludes.

## DISCUSSION

Catherine Lalumiere, the previous prime secretary of the European Council has said: "We stand at a crossroads between the conception of the family which prevailed in the past and that of the future. We must take account of the past, we must work in the present, and we must look towards the future" ("Family Matters", Occasional Papers Series, 1, 1992: 5).

The reflection of societal change in the families has been in some cases adaptive, in others, destructive, threatening the survival of the family. As with rapid external change, changes internal to the family bring both opportunities and problems, benefits and costs, and certainties and risks. Families act not merely as recipients of change: they also serve as its agents.

### **Thesis 1: Transformation has decreased the levels of people's subjective well-being.**

1. *The speed of social change alone is a conspicuous factor of stress in families.* Individuals often are not able to adapt as rapidly as changes occur. For that reason, rapid change, even positive in essence, brings emotional tensions and fear of loss of cognitive control over the situation, which results in feelings of powerlessness and dissatisfaction with decrease in levels of subjective well-being.
2. *People who are overwhelmed and distressed by multiple social change find themselves rejected and excluded from the society and its development.* Loss of social participation favours loss of personal identity and development of alienation (Schacht 1994). Alienation is a problem of over-choice rather than under-choice. An individual has to make a choice between different social groups, parties, even nationalities and countries, to create a new personal identity in a new social, economic and political situation. At the time of social transformation, the meaning of old social participation will be replaced with new one.
3. *The legacy of the fifty years of socialism and the totalitarian system is the additional factor that endangers the levels of subjective well-being.* The socialist state took responsibility for giving work, free education, medical service, and low price public transport. Family policy was oriented towards the working woman and, therefore, the state provided a well-organized set of pre-school institutions for children. Housing costs were partly paid by the state and expenditure on rent was low in the family-budget. The state, through work agencies, or trade unions, took care of the people who had good work records and established opportunities for staying in holiday homes, sanatoriums. The state dealt with the deficiency in consumer goods by providing these

through the workplace. Deacon (1992) called this type of social security system 'party-state/workplace paternalism': allocation according to work record rather than necessity led to unmet needs of those falling outside the insured categories of risk. Deacon (1992: 7) concludes: "Welfare recipients were objects of provision and never active subjects in defining needs and running services that met needs". A shortage of labor under the Soviet system made people unconcerned about the quality of work, since they never feared losing their job. Currently increasing unemployment has been a real shock for those experiencing it. The life philosophy of planned economy and paternalistic care of the state has produced '*learned helplessness*' and lack of '*self-help mentality*'. There are people who, after loss of job or permanent income, unexpectedly find themselves among the group which, at least temporarily, needs social welfare services.

4. *People coming from the totalitarian system have started to reform their life philosophy.* At first, the opposition of concepts which were characteristic of the old system and new ones which are typical of the expected society can be noticed. The confrontation of the old and the new terms contain denial of the old and attribution of highly positive meaning to the new terms, until personal encounters: unemployment is a 'good term' because it creates competition and forces higher work standards, until the person himself loses a job; the market economy as a concept is positive because it uncovers numerous possibilities for better life, until one faces problems and unsuccessful attempts to find own place in the labour market.

**Thesis 2: Transformation has led to decrease of people's objective welfare.** An analysis of the structure of the expenditures of respondent households in August, 1992 [paper VI] and in January, 1994 (Figure 7), reveal a deformed structure of consumption.

Almost all the households (the upper tenth decile is excluded) have a rather similar consumption structure: about half or more on food, 15–20% on housing, about five percent on clothes, shoes, etc. The possibilities to meet other needs such as the purchase of durable goods, paying transport costs, education, leisure, health, and travelling are very limited. Whereas the share spent on food is smaller compared with August, 1992 when it formed up to 3/4 from the household disposable income [VI: 140], the household budget is even tighter now due to the increased housing costs. Many households cannot pay for housing or pay only a part of it. The absolute expenditures (in kroons) of the households reveal different standards of living. The households with a lower standard of living and low resources have to accommodate their way of life to their small financial resources. The households with higher living standards aspire to develop a way of life that needs more money to conform with their financial as well as social position.

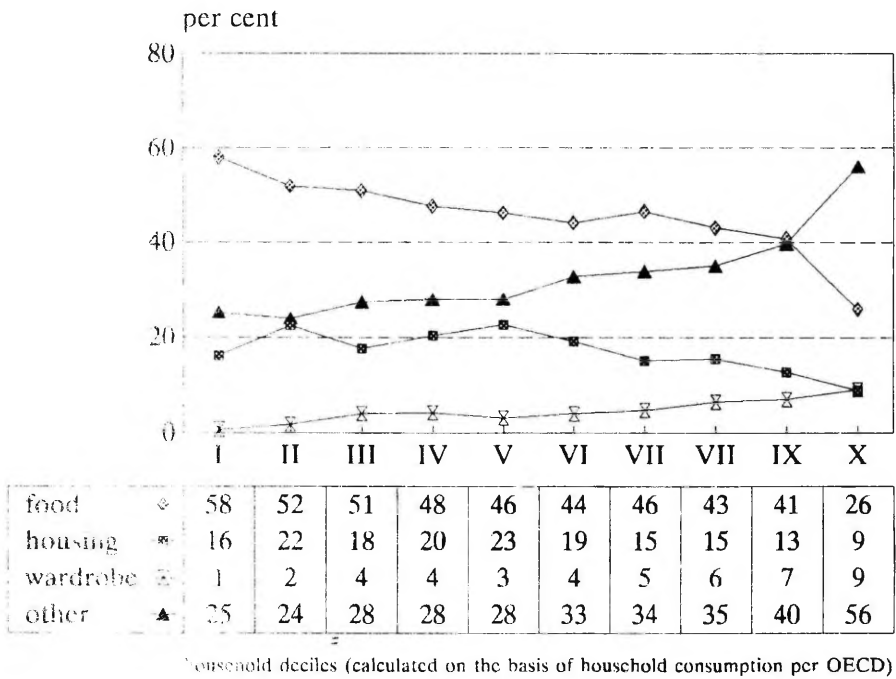


Figure 7. The structure of expenditures in household expenditure deciles in January 1994

As an average, almost one tenth of observed households have an income not ensuring satisfaction of minimum physiological needs. Households with children are at higher risk for physiological survival. Households with three and more children are in the worst situation; their lack of economic resources is the most acute. In general, a single-parent household has less resources in comparison with a two-parent household. Whether a parent is engaged in the labour market, i.e., has stable income or not, determines the income level of the household to a greater degree than only the presence of one or both parents. The higher number of dependants and the lower number of breadwinners in one's household multiplies the risk of falling under the physiological poverty line.

Townsend in the foreword to his famous book "Poverty in the United Kingdom" has written: "*Their ... (-the people in poverty-) ... resources are so seriously below those commanded by the average individual or family that they are, in effect excluded from ordinary living patterns, customs and activities*" (Townsend 1979: 31).

### **Thesis 3: Transformation creates contradictions between objective welfare and subjective well-being among families.**

Four positions of objective welfare and subjective well-being (*subjectively perceived quality of life*) among families have been presented by Zapf (1984).

The dynamic interrelatedness of the objective welfare and subjective well-being of a family can give some insights in the processes that families experience at this time of transformation (Figure 8).

OBJECTIVE WELFARE	SUBJECTIVELY PERCEIVED QUALITY OF LIFE (WELL-BEING)	
	POSITIVE	NEGATIVE
POSITIVE	(a) Positive concordance (well-being)	(b) Dissonance (dissatisfaction-dilemma)
NEGATIVE	(d) Adaptation (satisfaction-paradox)	(c) Negative concordance (deprivation)

Figure 8. Adapted from: Zapf W. (1984). The four well-being positions. In: Glatzer and Zapf: Lebensqualität in der Bundesrepublik Deutschland, 1984: 5.

1. *Positive objective welfare level corresponds to positively perceived quality of life (Figure 8 (a)).* People and families who have been able to answer the challenge given by the transformation have successfully applied their potential in production of resources for their own life. As a rule, the decrease in their welfare has been of short duration. The objective welfare and subjectively perceived quality of life may be contradicting each other only in the way of both experiencing 'Western consumerism' abroad and limited opportunities to develop the same in one's personal life. Having positive attitudes towards the development and further perspectives of the state, they are ambitious to reach the normal society and to put 'Western consumerism' work by the quickest possible way.
2. *Positive objective welfare accompanies with subjectively perceived low quality of life in some families due to the fact that accumulation of welfare resources has noticeably decreased (Figure 8 (b)).* Being subjectively unsatisfied with objectively satisfactory living conditions, represents, according to Zapf (1984: 24–25) 'dissatisfaction dilemma'. *Dissatisfaction dilemma* takes large scale among families at the time of transformation due to the problems of economic and psychological coping with societal change. The forces that complicate the situation, are the previous life philosophy of planned economy and paternalistic care of the state, and the lack of both entrepreneurship and the experience of competition.
- 2.1 *The state of dissonance between positive objective welfare and subjectively perceived low quality of life (Figure 8 (b)) awakens a desire to restore the former customary way of life and develops a feeling of being excluded from*

*habits, traditions, i.e. from the former life-style.* Ringen (1987: 134) states: "Poverty in terms of how people live is not the same as poverty of low resources". If a person who has a colour TV-set, a car, or a decent apartment, now spends more than half of all the expenditures on food, can no longer use a car because of the expensive petrol, cannot habitually go to the cafe, cannot buy any desired new book, or cannot replace an old refrigerator with a new one, then what is he and what is his household like in the situation he happens to live in? What is the effect on this person's or family's lifestyle? He/she/the whole family has to give up the customary way of life because of changes in society and the new financial situation. This is poverty in a large scale (Ringen 1987).

The following case (Case 1) characterizes the strive to restore the former life style of a person whose accumulation of welfare resources has noticeably decreased during the transformation. Being dissatisfied with the new economic situation she is inventive in finding opportunities to experience her old life style even if for a while.

Case 1 (a life situation, observed by the author).

*An old lady, over 70 years old, entered a cafe and asked the waitress to give her a cup of tea on credit because she had no money to buy it. Next week she came, paid her debt and asked for a cup of coffee with cream and some cakes — that day was her pension day.*

Bjorn Hvinden (1994: 2) refers at Georg Simmel's essay written at the beginning of the century, where he states that poverty may be interpreted as a *social relationship*, and not only as a *lack or deficiency of means*.

- 2.2. *Decrease in accumulation of people's welfare has caused a situation that excludes the normal development and growth of the household.* This situation is especially threatening for young families. The persons who already have furnished their homes and have brought up their children are not in real need of obtaining new durable goods as much as the young families are (Case 2).

Case 2

*A mother wrote to a local daily newspaper that she had three children aged nine, seven and one, each one of them received an allowance of EEK 60 monthly. She was on maternity leave and received EEK 90 monthly. Her husband's disposable income was 1.5 minimum wage. Her concern was that she was not able to buy food with the required nutritional value for her children. This is not starvation: the woman cannot guarantee the emotional and mental welfare of her children, she cannot pay for their hobbies, she has no money for a movie, theatre or books. Such a situation makes her*

*distressed and for that reason she is not able to have a normal emotional atmosphere at home.*

It is as if an imaginary starting line for people in Estonia where the households occupy their places for further life, only those who have settled down and have their own homes earlier have more favourable starting position — even if they are not able to develop their households resources because of the high prices and low income level today.

- 3. Due to the fact that the accumulation of objective welfare has decreased or stopped for some households, they are losing their present objective welfare resources (e.g., sell a car, exchange their flat for smaller one, personal things are unable to replace worn-out, etc.). Facing serious problems of economic survival, they are socially deprived (Figure 8 (c)).* First, these are households of people in retirement age, mothers taking maternity leave, the handicapped, etc. They form a traditional group of people who in every way are dependent on the welfare system. The breakdown of the previous welfare system has produced a remarkable decrease in their resources and many people have fallen into deep poverty. Second, there are people who, after losing a job or permanent income unexpectedly find themselves among the group which at least, temporarily, needs social welfare services. They feel powerless to improve the situation and confused by the idea what will happen to them in the near future (Case 3).

Case 3 (from a reader's letter to a local newspaper).

*"Today, the average daily income of the unemployed is a little more than three kroons. At the same time the settled daily minimum food expenses for a prisoner is EEK 10. There are few possibilities to find a job. Employers require good skills, knowledge of foreign languages, good appearance, possession of a phone and a car, etc. How can an unemployed person have a good appearance with her repaired shoes, without make-up, with no appropriate hairstyle? How to smile while feeling the depression and concern about tomorrow? How to break out from this circle?"*

- 4. Low level of objective welfare coincides with estimation of quality of life as positive (Figure 8 (d)).* Dissatisfaction is a psychological state that cannot be endured by an individual in the long run because of the associated cognitive tensions (Festinger 1957; Olson & Schober 1993). The individual has two choices to reduce this tension: either to change the situation or to adapt his/her own personal standards to the undesirable situation. The latter phenomenon is called '*resigned adaptation*' by Ipsen (1987), Berger-Schmitt (1987) and Latten (1989).

The people who adapt their personal standards to the undesired situation, cope with the situation and a state of mental satisfaction is produced. The adaptation or resignation of people to their poverty situation is determined 'satisfaction paradox' by Zapf (1987). Being satisfied or resigned with the state of poor living leaves them incentive to take action. They feel, they have 'missed the boat', they are not able to protect their personal interests and cannot change the situation in which they are involved in [papers IV and V].

Instead of Case 4:

*The author of current thesis was involved in the Pilot Study of "Living conditions in Estonia" organized by FAFO International (Norway) in cooperation with the Unit of Family Studies of Tartu University in September–October 1993 and in cooperation with Estonian Republican Statistics Authority and Ministry of Social Affairs in 1994. Both studies were carried out using direct interviews. The interviews revealed a phenomenon of accommodation of personal needs and standards to the lowered resources. The respondents could hardly remember anything they could not purchase during the previous week because of lack of money. The majority of the 'satisfied poor' respondents estimated their life situation as 'good'.*

The people who are resigned from the former life style, even do not feel real need to restore it. They state that if nothing unexpected happens, they can cope with the situation else they will experience severe troubles and tensions again.

**Thesis 4: The forces of societal change have brought changes in families themselves.**

1. *The changing socio-political and economic system in Estonia has caused postponement of family formation.* The number of marriage contracts in 1993 is 61% from that in 1989 (Figure 9). At the same time, the number of divorces has decreased, as well. The divorce rate has decreased from 3.8 per 1000 inhabitants in 1988 to 3.6 in 1991. Only in 1992, is there a noticeable increase in divorce. This was the year when the Estonian passport was introduced and every divorced person who had not registered his/her divorce in the local Registrar's Department did this before a new passport was issued. Unfortunately, nothing can be said about the changes in the prosperity of marriages due to the nationality of the spouses. From the year 1992, the nationality of a person is not registered in the Registrar's Department.

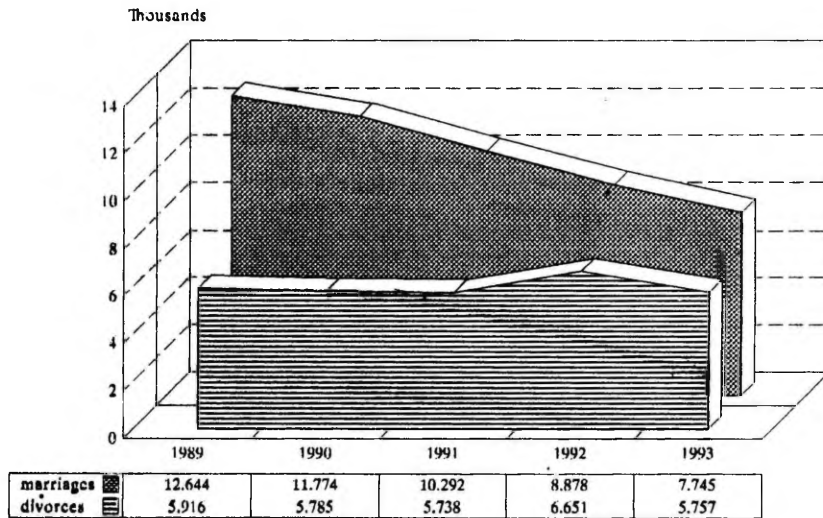


Figure 9. Number of marriages and divorces in Estonia 1989–1993.

2. *The transformation has caused changes in the fertility patterns.* Proceeding from the fact that the number of marriage contracts has decreased during the years of transformation, the total number of births in 1993 forms 62% from that in 1989 (Figure 10). The decrease in birth rate is noticeable among legitimate births. At the same time, the number of the illegitimate births has not considerably changed but its share in the total number of births has significantly increased. In 1993 it constitutes 38% from the total number of births (in 1989 it was 25%).

The transformation in Estonia has created many new possibilities for young people to study, complete one's education abroad, or prepare oneself economically for one's family life. For that reason, young people postpone the registration of a marriage and replace it with cohabitation more often. The availability of contraceptive methods has made family planning more effective.

Another factor, that may decrease birth rate and support postponement of a marriage contract comes from facing economic and psychological stresses at the time of transformation. People of fertile age ask questions such as whether it is reasonable to bring children to such a world, or what resources are available for bringing up the children.

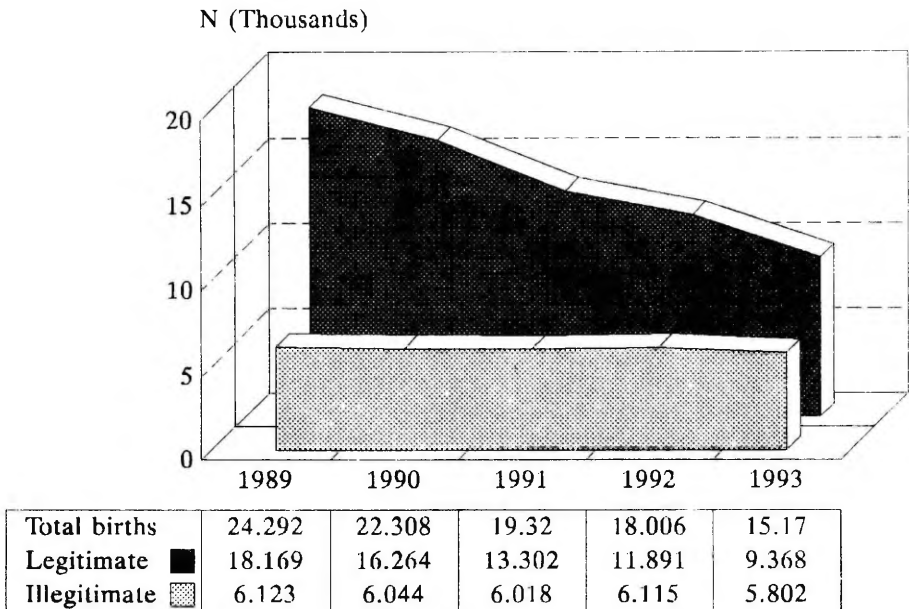


Figure 10. Dynamics of births in Estonia in 1989–1993.

**Thesis 5: Transformation has brought new resources negative as well as positive for the families.**

Contemporary families in Estonia are besieged with internal as well as external stresses, as evidenced by high divorce rate, decreasing number of marriage contracts and legal births, poverty and social stress. On the other hand, only now some special challenge for the families can be revealed.

1. *Family as a social institution keeps the role of a carrier of ethnic identity.* Individual families who are on the front edge of social change are often adaptable and flexible. In contrast to this flexibility, the family as part of philosophy is usually seen as conservative and traditional (Elshtain 1982). For years, the Estonian family has been the carrier of a social memory and ethnic identity. Some psychological preconditions for that purpose have been the patience and assiduousness of the Estonian character, appraisal of individual work and comparatively high educational level of the population.

At present, being free from the 'double lives' (i.e., unspoken ideas and feelings that come from social memory confronting ideologically expected behaviour at the time of occupation), the family has taken an active role in restoring the ethnic traditions. Furthermore, the family has a special place in preserving ethnic identity of its members in the current situation where Estonia has opened to other countries and to their multiple impacts. A Protestant way of life instead of the empty code of ethics and forced atheistic way of life makes changes in value orientations possible.

2. *Family takes an active role in directing the redefinition of life philosophy and the reconstruction of learned helplessness of its members.* Individual families must adapt to the changing society. Low economic resources of a family push family members to search for new solutions for gainful employment. On the other hand, high entrepreneurship results in high work load and increased individuation processes. The term '*individuation*' means the differentiation of the individual from the family, his or her participation in activities outside the family not as a family member or as a representative of a certain family but as an individual (Haavio-Mannila & Strandell 1990). High individuation promotes alienation processes between the family members and the problems of preservation of psychological closeness in the conjugal relations will possibly get more acute. High divorce rate of registered marriages besides the spreading alternatives to traditional family forms will keep its level on account of high vulnerability of conjugal relations and the external destructional forces.
3. *The family restores its instrumental roles in a society.* The whole Estonian society is on the way to a market economy that will be mainly based on private property. Private property that is owned not only by separate individuals but by the whole family moves the family towards its ancient roles of supporting and caring. The family unit is likely to become increasingly important as a social resource: the replacement of stateism with familism in family policy presumes families to remain the most obvious source of care and support for their members. Clulow (1994: 5) concludes: "...the individual values of the market place, because they leave people to their own devices, can be expected to strengthen family bonds because there are no other support systems available".
4. *The transformation has brought changes in the internal roles of a family.* A short research project aimed at the analysis of marital expectations among candidates of students to Tartu University was carried out by the researchers of the Unit of Family Studies in 1991. The study revealed that 12.8% of the male respondents of Estonian origin had an opinion that the reasonable number of children in a family could be zero. In comparison with the other studies concerning the preferred number of children in a family (Haavio-Mannila, Lammi & Tiit 1990; Kutsar & Tiit 1982; Pleer, Tammjärv & Tammjärv 1990), the attitudes towards the number of children in a marriage had not changed among the female respondents. In essence, the study revealed a situation where men had got ready to restore their traditional roles in the family of representing one's family unit in a society (instrumental role by Parsons) and taking responsibility over the well-being of the family members.
5. *Spreading individualistic orientation, equality of sexes and Western consumerism as an ideal will stay a considerable regulator of birth rate in a family.* To Clulow (1993: 272), the families as producers are reforming into families

as consumers. Individual values gain importance over the collective ones. Conflict of values associated with the preferred number of children versus reality that dictates economic dependence is evident. Women continually enter the paid workforce, while many men and young people face uncertain employment prospects. For the over-employed the demands of paid work can compete with those of family life, especially when the child-rearing years coincide with the peak performing years of paid employment (Clulow 1993: 269). Family planning possibly imposes a fee to individuation and the ideal of Western consumerism.

## CONCLUSION

The family system, besides being of interest in its own right and something that may help us understand individual psychologies, is something through which the wider social processes can be explained. Referring to Morgan (1985: 283), the family has the two-edged character of launching and receiving impacts between the individual and society. The current study has documented how families reflect the transformation process in Estonia in 1988–1994. The focus has been put on the psychological and economic coping and adaptation processes.

### *The study can be concluded as following:*

- 1. Transformation has decreased the levels of people's subjective well-being.* The rapidly changing society has put to test the abilities of coping and adaptation with the societal change of the individuals and the whole families. The process uncovers new tensions, dislocation of the locus of control, the problems of reconstruction of the new life situations and self-reidentification. As a result, the individuals with the lower levels of adaptation experience non-participation and the state of being alienated from the society and its development.
- 2. Transformation has led to decrease of people's objective welfare.* In the course of the societal transformation, the families experience changes in their welfare resources. The transformation leads to polarization of the whole population proceeding from the success of an individual economic activity and entrepreneurship. As a result, the traditional groups of people and families supported by the welfare services have been supplemented by the groups of people and families who have suddenly lost their welfare resources in the course of societal change.
- 3. Transformation creates contradictions between objective welfare and subjective well-being among families.* The overall decrease in people's welfare and well-being that accompanies transformation, puts their previous welfare resources and subjectively perceived quality of life in contradiction. People

overwhelmed with economic problems and being distressed by multiple social change find themselves rejected and excluded from the possibilities offered by the society. Loss of old welfare resources and incapacity of production new ones leads to resignation and adaptation of personal living standards to the lowered resources. Only the further documentation of the situation and analysis of the marginalization process can give an answer, who from those of losing their welfare resources can regain one's previous position in the society or even cross it and who will become the producer of the groups of under-class.

4. *The forces of societal change have brought changes in families themselves.* The number of marriage contracts as well as the number of legal births has noticeably decreased during the last six monitored years. The families face new positive and negative resources for their development. The dilemma between the family's role of a carer and the ideal of Western consumerism becomes the most apparent.

## ACKNOWLEDGEMENTS

It gives me a great pleasure to take this opportunity of expressing my sincere thanks to all these who contributed in any way to this work.

In particular, I am indebted to:

Professor Ene-Margit Tiit, my scientific tutor, for her large knowledge, her generous personal support and many stimulating discussions filled with enthusiasm and inspiration.

Aita Tavit, former Head of the Unit of Family Studies, for her interest and encouragement.

Avo Trumm and Urmas Oja, my co-authors and good colleagues, for their stimulating discussions and neverfailing support .

Björn von Sydow, President of the Swedish National Foundation of Social Work and Ann Boklund, Research Secretary of the Swedish Association for Social Work, for their cooperation and support.

Professor Elina Haavio-Mannila from Helsinki University, for her helpful advice.

Associate Professor Marion Cohn from Ohio Dominican College, for her constructive remarks about my work.

Professor Jüri Allik, for his constructive criticism and encouragement.

Professor Marju Lauristin and Professor Peeter Vihalemm, for their great interest and support.

Vambola Leping, for his invaluable help with the computer work over the years.

Alan Sanders from Sheffield Hallam University, for his skilful revision of the English text.

Estonian Market and Opinion Research Centre (EMOR Ltd.) for cooperation.

And last, but not least, my husband and daughters, for their patience, never-ending support and encouragement.

The studies summarized in this thesis, were supported by the Estonian Foundation of Science, the Foundation of Social Science Research, the Swedish National Foundation of Social Work and the Round Table of the President's Chancellery.

## REFERENCES

- Ackoff R. L., Emery F. E. (1972). On purposeful systems. Chicago.
- Adams B. N. (1988). Fifty years of family research. *Journal of Marriage and the Family*, 1: 5-17.
- Aldous J. (1970). Strategies for developing family theory. *Journal of Marriage and the Family*, 2: 250-257.
- Andrews M. P., Buboltz M. M., Paolucci P. (1975). An ecological approach to the study of the family. *Marriage & Family Review*, 1- 2: 29-40.
- Arnkil E. (1994) How far should families be expected to care for their members? A Research perspective. Paper given at the conference "Who Cares? Implications of Caring Responsibilities for Couples and Families", marking the International Year of the Family held by the Commission on Marriage and Interpersonal Relations of the International Union of Family Organisations, Tuusula, Finland, May 15-18, 1994.
- Atkinson A. B., Micklewright J. (1992) Economic transformation in Eastern Europe and the distribution of income. Cambridge: Cambridge University Press.
- Benson C., Clay E. (1992) Eastern Europe and the former Soviet Union: Economic change, social welfare and aid. *ODI Report*. ODI. London.
- Berardo F. M. (1980) Decade preview: Some trends and directions for family research and theory in the 1980s. *Journal of Marriage and the Family*, 4: 723-728.
- Berger-Schmitt R. (1978). Housing: Objective conditions and perceived quality of housing. *German Social Report (Part B, Subjective Well-being)*. IW. Zapf, et al. *Social Indicators Research* 19: 1-171.
- Bohannon P. (1970) Divorce and after. New York: Doubleday.
- Borden W. (1991). Stress, coping, and adaptation in spouses of older adults with chronic dementia. *Social Work Research & Abstract*, 1: 14-21.
- Boss P., Rossa W., Schumm W, Steinmetz S. (1993) Sourcebook of Family Do-horty W., La Theories and Methods: A Contextual Approach. New York: Plenum.
- Broderick C. B. (1971). Beyond the five conceptual frameworks: A Decade of development in family theory. *Journal of Marriage and the Family*, 1: 139-159.
- Brown L. H., Kidwell J. S. (1982) Methodology in family studies: The other side of caring. *Journal of Marriage and the Family*, 4: 833-839.
- Burgess E. W. (1926) The family as a unity of interacting personalities. *Family*, 7: 3-9.
- Burr W. R. (1973). Theory Construction and the Sociology of the Family. New York: Wiley.

- Burr W. R., Leigh G. K. (1983). Famology: A New discipline. *Journal of Marriage and the Family* 3: 467-480.
- Cherlin A. J. (1981). Marriage, divorce, remarriage. Cambridge: Harvard University Press.
- Christensen H. T. (1964). Development of the family field of study. *Handbook of marriage and the family* /H. T. Christensen. Chicago: Rand McNally, 3-32.
- Clulow C. (1993) Discussion Paper. New families? Changes in societies and family relationships. *Sexual and Marital Therapy* 3: 269-273.
- Clulow C. (1994) A Report of a conference "Who Cares? Implications of Caring Responsibilities for Couples and Families", marking the International Year of the Family held by the Commission on Marriage and Interpersonal Relations of the International Union of Family Organisations, meeting at Tuusula, Finland, May 15-18th 1994.
- Contemporary theories about the family, Vol 1 (1979a). /W. R. Burr, R. Hill., F. I. Nye, I. Reiss. New York: Free Press.
- Contemporary theories about the family, Vol 2 (1979b) /W. R. Burr, R. Hill., F. I. Nye, I. Reiss. New York: Free Press.
- Cox D. (1994) The Role of welfare personnel in an people-centered approach to social development. Keynote Address. *Programme & Abstracts*. 26th ICSW World Conference 'Global Welfare'94', July 3-7, 1994, Tampere, Finland: 217-231.
- Cronbach L. J. (1951). Coefficient alpha and the internal structure of tests. *Psychometrika*, 16: 297-334.
- Deacon B. (1992). East European welfare: past, present, future in comparative context. *The New Eastern Europe: Social policy past, present and future* / B. Deacon. SAGE: 1-30.
- Dellenbrant J. A. (1993). Democracy and poverty. The implementation of social reforms in the countries of Central and Eastern Europe. *Scandinavian Journal of Social Welfare* 3: 150-157.
- Dumon W. (1993) The family in the post-modern society. *Paper given at the meeting of the Commission on Marriage and Interpersonal Relations of the International Union of Family Organizations, Baden, 6-9 May 1993*.
- Elshtain J. B. (1982). The Family in political thought. Amherst: University of Massachusetts Press.
- Eurostat (1990) *Rapid reports. Population and social conditions*. Luxembourg, Publications Office of the European Communities, 1990, 7. "Family Matters", *Occasional Papers Series*, 1, 1992: 5.
- Ferge Z., Kolberg J.-E. (1992). Social policy in a changing Europe. Boulder, CO, Campus/ Westview.
- Festinger L. (1978). Theorie der kognitiven Dissonanz [Theory of Cognitive Dissonance]. Stuttgart: Huber.

- Frude N. (1991) Understanding family problems. A Psychological approach. John Wiley & Sons.
- Goode W. J. (1959). Horizons in family theory. *Sociology today* (Vol 1). /R. K. Merton, R. Broom, L. S. Cottrell. New York: Basic Books.
- Grotevant H. D., Carlson C. I. Family assessment: A guide to methods and measures. New York: Guilford Press.
- Haavio-Mannila E., Strandell H. (1990). Family sociology in the Nordic countries. *Paper given at the ISA XII World Congress of Sociology, 9–13 July 1990, Madrid.*
- Haavio-Mannila E., Lammi J., Tiit E.-M. (1990) The students' marriage ideals in Helsinki and Tartu in 1989. *Family Problems IX*: 80–100, Tartu: University Press.
- Habermas J. (1976). Towards a rational society. London: Heinemann.
- Haken H. (1978). Synergetics. London.
- Handbook of family measurement techniques. /J. Touliatos, B. F. Perlmutter, M. A. Strauss (1990) California: Sage Publ.
- Handbook of marriage and the family (1964) /H. T. Christensen, Chicago: Rand McNally.
- Hareven T. K. (1987). Historical analysis of the family. *Handbook of marriage and the family* /M. B. Sussmann, S. K. Steinmetz. New York: Plenum Press.
- Heikkilä, M. (1990) Poverty and accumulation of welfare deficits. *Lehto, J. /Ed. Deprivation, Social Welfare and Expertise*, Helsinki: National Agency for Welfare and Health. 33–47.
- Hill R. (1966). Contemporary developments in family theory. *Journal of Marriage and the Family*, 1: 10–25.
- Hill R., Hansen D. A. (1960). The Identification of conceptual frameworks utilized in family study. *Marriage and Family Living*, 2: 299–311.
- Holman T. B., Burr W. R. (1980). Beyond the beyond: The Growth of family theories in the 1970s. *Journal of Marriage and the Family*, 4: 729–741.
- Hvinden B. (1994) The sociology of ambiguity: Poverty and integration in a Simmelian perspective. *Paper given on the XIII ISA World Congress of Sociology, 18–23 July, 1994, Bielefeld, Germany.*
- Ipsen D. (1978). Das Konstrukt der Zufriedenheit [The concept of satisfaction]. *Soziale Welt* 29: 44–53.
- Kantor D., Lehr W. (1975). Inside the Family. San Francisco.
- Kelly E. L. (1941). Marital compatibility as related to personality traits of husbands and wives as related self and spouse. *Journal of Social Psychology* 1: 193–198.
- Klein J., Calvert G., Garland N., Polomo M. (1968). Pilgrim progress I: Recent development in family theory. *Journal of Marriage and the Family*, 3: 677–687.

- Kultygin V. P. (1993) Poverty and social trends in Russia. *Scandinavian Journal of Social Welfare*, 3: 142–149.
- Kutsar D. (1990a) Couples in an urbanized setting: expectations and reality. *Estonian Population and the Family. Family Problems*, X: 60–81. Tartu: Tartu University Press.
- Kutsar D. (1987) Directing your spouse's attitude towards yourself as a resource of relationships (in Russian). *Sociological Problems of Family and Health Care*. Materials of the 6th Conference of Baltic Sociologists. Vilnius: Vilnius University Press.
- Kutsar D. (1991a) Estimation and self-estimation as a social attitude: possibilities of couple therapy. *Family Therapy in Different Cultural Contexts. Abstracts for the 3rd World Family Therapy Congress, Jyväskylä, Finland, June, 2–6, 1991*: 222.
- Kutsar D. (1991c) Estimation and self-estimation as a social attitude: some conclusions for the couple therapy. *Paper given at the 3rd World Family Therapy Congress in Jyväskylä, Finland, June, 2–6, 1991*: 222.
- Kutsar D. (1990b) Family development and divorce in Estonia: empirical research. *Family Situation and Policy. Family Problems*, VIII: 8–14. Tartu: Tartu University Press.
- Kutsar D. (1991c) Family – gender – society: students' attitudes in Finland and Estonia. *Paper given at the international conference "Gender Blending" in Tampere, Finland, June 10–11, 1991*.
- Kutsar D. (1990c) Informal stability of the family in Estonia (in Slovak). *Aktuálne Problemy Zeny a Rodiny - Mladeze a Vychovy*. Bratislava: 161–170.
- Kutsar D. (1991d) Marriage breakdown in Estonia. *Population Research in Finland XXIX*. Helsinki: Väestöliitto, 1991: 73–82.
- Kutsar D. (1994) Multiple social change and stress of people in Estonia. *Sociological Abstracts*, suppl. 173: 174.
- Kutsar D. (1982) Mutual and self-estimations: Comparison of people to marry, conjugal and divorcing spouses (in Russian). *Studies about the quality of marriage. Family Problems*, V: 42–57. Tartu: Tartu University Press.
- Kutsar D. (1990d) On the model of family development and breaking up. *Sociological Abstracts*, Suppl. 160: 130.
- Kutsar D. (1988a) On the problems of children in an urbanized setting. *Young Families and Their Children*. Riga: Zinatne. 9–10.
- Kutsar D. (1988b) People who intend to marry and newlyweds: Expectations and reality (in Russian). *On the problems of family functioning. Family Problems*, VII: 39–54. Tartu: Tartu University Press.
- Kutsar D. (1994) Social change and stress in Estonia. Submitted for publication in the *Scandinavian Journal of Social Welfare*.

- Kutsar D. (1993) Social stress of Estonian people at the time of big changes. *Abstracts of the III European Congress of Psychology, July 4–9, 1993 Tampere, Finland*: 208.
- Kutsar D. (1994) Sotsiaalsest stressist ja psühholoogilisest toimetulekust Eestis [On social stress and psychological coping in Estonia]. *Akadeemia* 1994, No.12: 2541–2566 (in Estonian).
- Kutsar D. (1984) The personality-based model of marriage quality and its determinants: An empirical model (in Russian). *On personalities of the spouses and quality of conjugal relationships. Family Problems*, VI: 5–25, Tartu: Tartu University Press.
- Kutsar D., Tiit E.-M. (1982) Behavioural characteristics in family formation (in Russian). *Studies about the quality of marriage. Family Problems*, V: 5–41. Tartu: Tartu University Press.
- Kutsar D., Tiit E.-M. (1980) On the regularities of family formation (in Russian). *Problems of family stability. Family Problems*, IV: 3–31. Tartu: Tartu University Press.
- Kutsar D., Tiit E.-M., Pall K. (1994) On the concept of family in Estonia: an empirical research. Paper given at the ISA XIII World Congress of Sociology, 18–23 July 1994, Bielefeld, Germany.
- Kutsar D., Trumm A. (1994a) Changed situation, remained needs: Challenge for welfare policy in Estonia. *Sociological Abstracts*, suppl. 173: 175.
- Kutsar D., Trumm A. (1993) Poverty among households in Estonia. *Scandinavian Journal of Social Welfare* 1993, 3: 128–141.
- Kutsar D., Trumm A. (1994b) The poor in Estonia: Adapted or deprived? *Programme & Abstracts, The 26th ICSW World Conference 'Welfare'94', Tampere, Finland, July 3–7, 1994*: 69.
- Larson, R. (1978). Thirty years of research on the psychological well-being of older Americans. *"Gerontologist"* 23: 109–125.
- Larzelere R. E., Klein D. M. (1987). Methodology. *Handbook of Marriage and the Family* /M. B. Sussmann, S. K. Steinmetz. New York: Plenum Press.
- Latten J. J. (1989). Life-course and satisfaction equal for everyone. *Social Indicators Research* 21: 599–610.
- Lazarus R. S., Folkman S. (1984). Stress, appraisal, and coping. New York: Springer.
- Levin I., Trost J. (1992) Women and the concept of family. *Family Reports* 21. Uppsala University.
- Lewis R. A., Spanier G. B. (1979) Theorizing about the quality and stability of marriage. *Contemporary theories about the family. Vol. 1.* /W. R. Burr, R. Hill, F. I. Nye, I. Reiss. New York: Free Press, 268–294.
- Locke H. J. (1947). Predicting marital adjustment by comparing a divorced and happily married group. *American Sociological Review*, 1: 187–191.

- Marklund S. (1993). Social policy and poverty in post-totalitarian Europe. *Scandinavian Journal of Social Welfare*, 3: 104–114.
- Marody M. (1992). Building a competitive society: Challenges for social policy. *A Background document for the International seminar "Towards a Competitive Society in Central and Eastern Europe: Social Dimensions"*, Kellokoski, Finland.
- Marsan L. (1994) Who cares? *Paper given on the 41st meeting of Commission on Marriage and Interpersonal Relations of the International Union of Family Organizations "Who Cares?" in Tuusula, Finland, 15–18 May, 1994.*
- Merton R. K. (1945). Sociological theory. *American Journal of Sociology* 3: 462–473.
- Miller B. C., Rollins B. C., Thomas D. L. (1982). On methods of studying marriages and families. *Journal of Marriage and the Family*, 4: 873–951.
- Monat, A., Lazarus, R. S. (1985). Introduction: Stress and coping — some current controversies. *Stress and Coping. An Anthology.* /Ed by A. Monat, R. S. Lazarus. New York: University Press, 1–2.
- Morgan D. H. J. (1985). *The Family, politics & social theories.* Routledge & Kegan Paul
- Nave-Herz R. (1994) The relationship between marriage and the family past and present. *Paper given at the XIII ISA World Congress of Sociology, 18–23 July 1994, Bielefeld, Germany.*
- Noorkõiv R., Annus T. (1994) Eesti teel turumajandusele: muutused sotsiaalsfääris [Estonia in transition to the market economy: changes in the social sphere]. Tallinn: EV Sotsiaalministeerium (in Estonian).
- Nye F. I. (1988). Fifty years of family research. *Journal of Marriage and the family* 2: 305–316.
- Nye F. I., Berardo F. M. (1966). *Emerging conceptual frameworks in family analysis.* New York: Macmillan.
- Olson G. I., Schober B. I. (1993). The satisfied poor. Development of an intervention-oriented theoretical framework to explain satisfaction with a life in poverty. *Social Indicators Research*, 28: 173–193.
- Pleer A., Tammjärv K., Tammjärv M. (1990) Ootused ideaalse elukaaslase suhtes: perekonnaga seotud väärtused tudengite hinnangutes [Expectations about an ideal spouse: family values as estimated by student respondents]. *Estonian family and ideal marriage. Family Problems IX*: 64–73. Tartu: Tartu University Press (in Estonian).
- Ringen S. (1987). Poverty in the welfare state? *The Scandinavian model. Welfare states and welfare research.* /R. Erikson et al. London: M. E. Sharpe, 122–138.
- Rodman H. (1980) Are conceptual frameworks necessary for theory building? The case of family sociology. *The Sociological Quarterly*, 2: 429–441.

- Schacht, R. (1994) The future of alienation. *Sociological Abstracts*, suppl. 173: 279.
- Schumm W. R. (1982) Evolution of marital and family interaction. *Handbook of family measurement techniques*. /J. Touliatos, B. F. Perlmutter, M. A. Straus. California: Sage Publications.
- Self-concept over the life span. Pretest 1. (1991). The University of Michigan, Survey Research Center, Institute for Social research.
- Settles B. H. (1987). A Perspective on tomorrow's families. *Handbook of marriage and the family* /M. B. Sussmann, S. K. Steinmetz. New York: Plenum Press.
- Social policy in the New Eastern Europe (1990) /B. Deacon, J. Szalai. Aldershot: Gower.
- Spanier G. B., Lewis R. A. (1980). Marital quality: A Review of the seventies. *Journal of Marriage and the Family*, 4: 825-940.
- Sprey J. (1988). Current theorizing on the family: An Appraisal. *Journal of Marriage and the Family*, 4: 875-890.
- Strauss A. (1947). Personality needs and marital choice. *Social Forces*. 2: 332-335.
- Thomas D. L., Wilcox J. E. (1987) The Rise of family theory. A Historical and critical analysis. *Handbook of marriage and the family* /M. B. Sussmann, S. K. Steinmetz. New York: Plenum Press.
- Tiit E.-M. (1990a) The Estonian population yesterday, today, and tomorrow. *Estonian population and the family. Family Problems X*: 4-42, Tartu: Tartu University Press.
- Tiit E.-M. (1990b) The expectations of Estonian Population towards the Family Policy in October 1988. *Family situation and policy. Family Problems VIII*: 28-29, Tartu: Tartu University Press.
- Tiit E.-M. (1990c) The students' expectations about family, marriage and partner. Differences in time and space. *Estonian family and marriage ideal. Family Problems IX*: 61-63. Tartu: University Press.
- Tiit E.-M., Haavio-Mannila E. (1981) Opiskelijoiden avioliittoihanteista Tartossa ja Helsingissä. *Sosiologia*, 3: 185-193 (in Finnish).
- Tiit E.-M., Kutsar D. (1990) The Economic situation and time-budget of families with children in Estonia and the problems of family politics. *Sociological Abstracts*, suppl. 160: 228.
- Tiit E.-M., Kutsar D. (1990) Fundamentals of nowadays Estonian Family Policy. *Family situation and policy. Family Problems VIII*: 41-52. Tartu: Tartu University Press.
- Tiit E.-M., Kutsar D. (1984). A Survey of the development of family theory abroad. *On personalities of the spouses and quality of conjugal relationships. Family Problems*, VI: 5-25, Tartu: Tartu University Press (in Russian).

- Tiit E., Kutsar D., Pall K. (1994) On the concept of family in Estonia: an empirical research. *Sociological Abstracts, suppl.* 173: 304.
- Tiit E.-M., Tavit A., Kutsar D., Keerberg A. (1982) Factors affecting marital contentment and stability. *Sociological research in the Baltic Socialist Republics* /M. Titma, P. Kenkmann, A. Matulionis, M. Taljunaite. Vilnius: Institute of Philosophy, Sociology and Law, 194–221.
- Toffler A. (1970). *Future shock*. New York: Bantam.
- Townsend, P. (1979) *Poverty in the United Kingdom. A Survey of household resources and standards of living*. Penguin Books Ltd.
- Trost J. (1988) Conceptualising the family. *International Sociology*, 3: 301–308.
- Trost J. (1990a) Do we mean the same by the concept of family? *Communication Research*, 4: 431–443.
- Trost J. (1993) Family from a dyadic perspective. *Journal of Family Issues*, 1: 92–104.
- Trost J. (1990b) On becoming a family. *Family Reports* 18. Uppsala University.
- Trumm A., Kutsar D., Oja U. (1993) Transformation process in Estonia: A Challenge for social policy. *Yearbook of Population Research in Finland. XXXI*. Helsinki: Väestöliitto, 1993: 104–110.
- Turner R. H., Shosid N. (1976) Ambiguity and interchangeability in role attribution: The effects of alter's response. *American Sociological Review*, 4: 993–1006.
- Uusitalo H. (1989). Income distribution in Finland. The effects of the welfare state and the structural changes in society on income distribution in Finland in 1966–1985. Central Statistical Office of Finland. Studies No. 148.
- Uusitalo H. (1992). The Scandinavian welfare state and poverty. *Themes* 4. Helsinki: National Agency for Welfare and Health.
- Warzywoda-Kruszynska W., Grotowska-Leder J. (1993) Poverty and social conditions in Poland during the transformation to a market economy. *Scandinavian Journal of Social Welfare*, 3: 115–127.
- Winch B. F. (1958). *Mate selection*. New York.
- Zapf W. (1984). Individuelle Wohlfahrt: Lebensbedingungen und wahrgenommene Lebensqualität [Individual well-being: Living conditions and perceived quality of life]. *Lebensqualität in der Bundesrepublik*. /W. Glazer and W. Zapf. München: Campus, 1–26.
- Ziehl S. C. (1994) The family as institution with reference to South Africa. *Paper given at the XIII World Congress of Sociology, 18–23 July 1994, Bielefeld*.
- Zimmerman S. L., Chilman C. S. (1988). Poverty and families. *Employment and economic problems*. /Chilman C. S. et al. London, Sage Publications: 107–123 (Families in Trouble Series, Vol 1).

# EESTI ÜHISKONNA TRANSFORMATSIOONI VÄLJENDUSTEST PEREKONNAS: SOTSIAALNE STRESS JA VAESUS

## KOKKUVÕTE JA JÄRELDUSED

Käesoleva uurimuse eesmärgiks on analüüsida Eesti ühiskonnas toimuva transformatsiooni väljendusi perekonnas, keskendudes perede majanduslikule ja psühholoogilisele toimetulekule kiirete sotsiaalsete muutuste aastatel 1988–1994. Töö lähtub põhieeldusest, et perekond on vahendaja rollis üksikisiku ja ühiskonna vahel, peegeldades ühiskonnas toimuvaid protsesse ning neid ise aktiivselt mõjutades.

Uurimuse tausta kirjeldamisel arutletakse selle üle, kuidas määratleda perekonda kui uurimisobjekti, esitatakse lühiülevaade pereuuringutest kui eraldiasuvast sotsiaalteaduslikust valdkonnast, pereteooriate arengust ning pereuuringutest Tartu Ülikoolis. Käsitletakse ka uurimusega otseselt seotud sotsiaalseid muutusi Eestis.

### *Töö koosneb kolmest alauurimusest:*

*Uurimus 1* annab ülevaate perekonnast Eestis, selle formeerumisest, arengust ja purunemisest. Autor esitab andmeid TÜ perekonnauurimisrühma poolt läbi viidud uurimustest (Artiklid I–III).

*Uurimus 2* analüüsib Eestis elavate inimeste reaktsioone ja tundeid sotsiaalse transformatsiooni ajal, määratleb need faktorid, mis determineerivad psühholoogilist toimetulekut sotsiaalse stressiga, eristab psühholoogilise heaolu tasemed sotsiaalse stressi suuruse järgi ja uurib suuremas sotsiaalses distressis olevat gruppi (Artiklid IV–V).

*Uurimus 3* käsitleb perede objektiivset heaolu ja selle muutumist sotsiaalse transformatsiooni käigus pere-eelarvete uuringu alusel. Analüüsitakse perede sisetulekuid ja tarbimise struktuuri, diskuteeritakse erinevate vaesuspiiride ja mõnede sotsiaalpoliitiliste printsiipide ümber. Vaadeldakse ka perede majanduslikku toimetulekut raskendavaid asjaolusid (Artiklid VI–VII).

Uurimuse kokkuvõttes on esitatud järgmised teesid:

***Tees 1: Transformatsioon on endaga kaasa toonud inimeste subjektiivse heaolu languse.*** Kiired muutused maa poliitilises, majanduslikus ja sotsiaalses elus nõuavad igalt üksikisikult uute olukordade selget mõistmist, muutustega toimetulekut ning enese re-identifikatsiooni muutunud situatsioonis. Suurenevad

inimestele esitatavad nõudmised, muutuvad sotsiaalsed suhted ja ühiskonnas levivad mitmesugused irratsionaalsed ootused.

*Tees 1.1: Kiired sotsiaalsed muutused ühiskonnas tekitab lisapinget, mis paneb inimeste toimetulekuressursid proovile ohustades nende subjektiivset heaolu.* Transformatsiooni ajal on muutused sageli kiiremad kui inimesed nendega kohaneda suudavad. Selle tagajärjeks on tajutud kontrollikeskme liikumine isiku seest välja, passiivsus, frustreeritus ja rahulolematuse.

*Tees 1.2: Olulise faktorina on subjektiivset heaolu ohustamas sotsialistlikust mõtteviisist ja totalitaarriigis elamisest tingitud iseärasused inimeste eluorientatsioonides.* Sotsialistlikust plaanimajandusest ja riigi paternalistlikust sotsiaalpoliitikast tulenenud inimeste õpitud abitus ja eneseabimentaliteedi puudumine saavad olulisteks kohanemist takistavateks asjaoludeks üleminekul plaanimajanduselt turumajandusele.

*Tees 1.3: Inimesed, kes on sotsiaalsete muutuste tõttu distressi sattunud, tunnevad ennast ühiskonnast ja selle arengust välja tõrjututena.* Madala subjektiivse heaoluga inimesed kogevad tõsiseid raskusi uute olukordade mõistmises, muutustega toimetulekus ja enese koha leidmisel uutes tingimustes, mille tõttu nad tunnetavad ka vähest isiklikku osalust eesti ühiskonna arengus.

*Tees 1.4: Totalitaarriigi pärit inimesed on asunud oma eluorientatsioone uutele tingimustele vastavaiks kohandama.* Täheledatav on üsna kiire vanade mõistete (plaanimajandus, tööjõupuudus jne.) asendamine uutega (turumajandus, tööpuudus, konkurents jne.). Aktiivselt eitades vanu mõisteid ja andes uutele mõistetele vaid positiivset sisu, muutub see isikliku kokkupuute korral konkreetse nähtusega oluliseks stressi suurendavaks asjaoluks.

*Tees 2: Transformatsioon on endaga kaasa toonud inimeste objektiivse heaolu languse.* Ühiskonna majanduslik ümberstruktureerumine peegeldub vastuolus madalate palkade ja tarbija jaoks kõrgete hindade vahel, mis on tingitud perede tasakaalustamata tarbimisstruktuuri. Ühiskonna üldise majandusliku polarisatsiooni taustal on traditsioonilistele sotsiaalabi klientidele lisandunud inimesed, kes transformatsiooni käigus on kaotanud oma objektiivse heaolu ressursside akumulatsiooni võimalused, samas ära kulutamas ka olemasolevaid ressursse. Heaoluressursside akumulatsiooni aeglustumine või seiskumine paneb ohtu perede arengu, seda eriti noorte perede puhul, kelle vajadused tarbimise osas on mitmekesisemad, suuremad ja muutuvamad.

*Tees 3: Transformatsioon loob vastuolu subjektiivse ja objektiivse heaolu vahel.* Suhetades objektiivselt mõõdetavat ja subjektiivselt tajutud elukvaliteeti, on võimalik välja tuua neli erinevat positsiooni.

*Tees 3.1: Inimesed, kes on suutnud toimivate muutustega kaasas käia ja transformatsiooni poolt pakutavaid uusi võimalusi edukalt ära kasutada, on säilitanud oma objektiivse heaolu ressursid ja kõrge subjektiivse heaolu ta-*

*seme.* Objektiivse heaolu langus ressursside akumulatsiooni mõttes on nende puhul olnud ehk lühiajaline. Psühholoogiliselt tunnevad nad ühiskonna arengu suhtes suurt osalust.

*Tees 3.2: Rahuldav objektiivse heaolu tase on vastuolus madala subjektiivselt tajutud elukvaliteediga, mis on tingitud heaoluressursside akumulatsiooni aeglustumisest transformatsiooni ajal.* Olukord, kus inimesed ei ole võimelised kasutama oma olemasolevaid heaoluressursse ja tunnevad ennast ilmajäetutena hajumuspärasest elustiilist, omandab transformatsiooni ajal laia ulatuse. Rahulolematuse dilemma väljendub perede majanduslikus käitumises iga uue materiaalse ressursi rakendamise püüdena harjumuspärase elustiili taastamise huvides.

*Tees 3.3: Seoses objektiivse heaolu ressursside akumulatsiooni aeglustumisega hakkavad pered ära kulutama ka oma seni säilunud ressursside, muutudes sotsiaalselt deprimeerituteks.* Esiteks on need isikud ja pered, kes traditsiooniliselt on olnud sotsiaalabi kliendid, kuid seoses sotsiaalabi süsteemi ümberkujundamisega on langenud vaesusse. Teiseks on need isikud ja pered, kes lühemat või pikemat aega vajavad sotsiaalabi toetust seoses sissetuleku kaotamisega või kelle sissetulek ei võimalda pere jaoks vajalikke ühiskonnas pakutavaid võimalusi ära kasutada.

*Tees 3.4: Madal objektiivse heaolu tase langeb kokku positiivse subjektiivse heaolu hinnanguga.* Rahulolematuse on psüühiline seisund, mis ei saa olemasolevate kognitiivsete pingete tõttu kaua kesta. Indiviidil on valida kahe võimaluse vahel: kas muuta kujunenud situatsiooni oma elustandarditele vastavaks või muuta oma elustandardeid mittesoovitud olukorrale vastavaks, e alistuvalt kohaned. Rahulolu paradoks on kirjeldatav üksikisikute ja perede puhul, kelle käsutuses on reaalselt vähe heaoluressursse, kuid kes ometi hindavad oma olukorda suhteliselt heaks. Nad on passiivsed midagi ette võtma, kuna ei näe reaalseid võimalusi oma praegust elustiili parandada või varasemat taastada. Sotsiaalpoliitika seisukohalt on nad ühiskonna arengu suhtes kõige suurem riskigrupp.

***Tees 4: Sotsiaalsed muutused on toonud kaasa muutusi perekonnainstitutsioonis.***

*Tees 4.1: Muutustega Eesti sotsiaalpoliitilises ja sotsiaalmajanduslikus elus on kaasnud abielude registreerimise arvu oluline langus, samal ajal kui registreeritud lahutuste arv on jäänud enamvähem samaks.* Sõlmitud abielude arvu vähenemist saab seostada mitmete faktoritega, sealhulgas abielu alternatiivide levikuga ja abiellumisaja edasilükkamisega, seoses sotsiaalse ja majandusliku küpsuse tähtsustumisega enne pere loomist.

*Tees 4.2: Transformatsiooniga on kaasnud muutused sündimuses.* Sündide arvu üldises vähenemises peegelduvad inimeste psühholoogilise ja majandusliku toimetuleku raskused. Sündimuse langus on täheldatav just regist-

reeritud abieludest sündinud laste osas, kuna ka sõlmitud abielude arv on oluliselt kahanenud. Samal ajal abieluvälised sünnid on jäänud enamvähem samale tasemele. Transformatsiooni ajal on oluliselt paranenud viljastuse kontrolli vahendite kättesaadavus ja teadmised nende kasutamise kohta, mis on teinud võimalikuks teadlikuma pereplaneerimise. Väljaspool abielu sündinud laste suhteliselt stabiilne arv viimastel aastatel annab kindlat tunnistust registreerimata kooselude ja teiste abielualternatiivide leviku kohta ühiskonnas.

***Tees 5: Transformatsioon on loonud uusi positiivseid ja negatiivseid ressursse perede jaoks.***

*Tees 5.1: Perekond kui sotsiaalne institutsioon on jätkuvalt tähtis rahvusliku identiteedi edasikandja eesti ühiskonnas. Aastaid on perekond olnud eestlaste sotsiaalse mälu ja rahvusliku enesemääratluse hoidja, kaitsmaks seda totalitaariis lahustumise eest. Käesoleval ajal, kui Eesti on avanenud välismaailmale, on perekonnal tähtis roll täita eesti rahvusliku identiteedi edasisel püsijäämisel.*

## **PUBLICATIONS**

# **STUDY I: MARRIAGE AND FAMILIES IN ESTONIA**

## **Papers:**

- I. Kutsar D. (1991) Marriage breakdown in Estonia. *Population Research in Finland XXIX*. Helsinki: Väestöliitto, 1991: 73–82.
- II. Kutsar D. (1990) Family development and divorce in Estonia: empirical research. *Family Situation and Policy. Family Problems*, VIII: 8–14. Tartu: Tartu University Press.
- III. Kutsar D. (1990) Couples in an urbanized setting: expectations and reality. *Estonian Population and the Family. Family Problems*, X: 60–81. Tartu: Tartu University Press.

# Marriage Breakdown in Estonia



DAGMAR KUTSAR

Research-Psychologist  
Tartu University

The divorce rate is a statistical estimation of marriage breakdown in society. In Estonia, as a rule, it has been calculated from the number of marriages contracted the same year. More rarely a calculation concerning the entire population is used.

The number of divorces is the number of divorces registered at the Registrar's Offices. If a couple has no children or no disagreements to resolve, they are divorced there and their divorce is registered automatically. If a couple does have children and/or mutual disagreements, they have to go through a court process. Only after the registration of the divorce in the Registrar's Office is a marriage legally dissolved and both ex-spouses have the right to remarry. Many spouses who have gone through the divorce process in a court and resolved their disagreement do not register their divorce immediately. In these cases their divorce will be included in the divorce statistics of the year it is registered. Some people, who have no intentions or plans for remarrying, never register their divorce. In a situation like this, the divorce never reaches the divorce statistics.

Thus, the divorce rate of a certain year is an approximate indicator of marriage breakdown. This number does not include all the people who were divorced in the courts; it does not include persons who have separated and whose marriage has actually ended.

The aim of this article is to present divorce data for Estonia and to analyze the social processes and factors influencing marriage breakdown. This article mainly concentrates on the year 1988, when 5,924 divorces were registered in the municipal Registrar's Offices of Estonia.

The statistical data used comes from the Estonian Republican Registrar's Department, from Civil Censuses and from various collections of statistical data. Unfortunately our state statistics has been quite superficial. Without more detailed investigations we cannot draw deep conclusions about people who are getting divorced.

## **Marriages, divorces and remarriages**

Divorce as a social problem in Estonian society gained in importance starting in the sixties, when a rapid increase in the divorce rate was noted.

From the sixties the number of divorces formed about one third of all marriages contracted the same year. The rapid increase in the divorce rate reached its peak in 1984, when the number of divorces formed already about one-half of the number of marriages contracted this year. During the last three years the divorce rate has stabilized at quite a high level, or at 45—47% (Table 1).

The increase in the number of remarriages has been higher than the rise in the divorce rate. Remarriages are a typical urban phenomenon. For example, in Tallinn, the capital of the Estonian Republic, 58.5% of all marriages in 1988 were first mar-

Table 1. Marriages, divorces and remarriages in Estonia.

Year	Marriages	Divorces per 100 marriages	Divorces per 1 000 inhabitants	Remarriage rate
1940	10,182	11.6		
1950	10,456	16.4		9.5
1960	12,146	20.9		13.5
1970	12,373	35.4	3.2	16.5
1975	12,443	38.9		20.0
1980	12,964	47.3	4.1	21.3
1984	12,530	49.4		
1985	12,861	47.1	3.9	25.7
1988	12,973	45.7	3.8	28.9

Table 2. Births in Estonia.

Year	Number of births			% of illegitimate births		
	All	Urban areas	Rural areas	All	Urban areas	Rural areas
1980	4,057	2,156	1,901	18.3	13.9	28.5
1985	4,897	2,808	2,091	20.7	16.8	30.0
1986	5,293	3,003	2,290	22.0	17.7	32.1
1988	5,788	3,342	2,446	23.1	19.2	32.1
1989	6,123	3,479	2,644	25.2	21.1	34.0

riages, but in a rural area, for example in the Võru district, this percentage was 75.2, on the island Hiiumaa even 79.1%.

The remarriage rate is high in regions where the divorce rate is high. It is a reflection of the more liberal social attitude toward the remarriage of the divorced and widowed.

When taking into account the fact that the number of first marriages is decreasing (Vikat 1989), one can conclude that divorce as a means of legal regulation of one's marital status does not mean the breakdown of marriage as a social institution but that the choice of spouse has failed.

The declining number of first marriages refers to the increase in the frequency of cohabitation. Cohabitation as an alternative to marriage or as a preparation period for one's marriage (trial marriage) has not been investigated in Estonia. The only approximate way to estimate the gaining importance of cohabitation in Estonian society is making an assessment with the help of data about births (Table 2).

Table 2 shows that for the last ten years the rate of illegitimate births has been comparatively high in Estonia, and it has increased about 5% during this period. The illegitimate birth rate in the countryside is notably higher than in the cities. This big difference is due to more widespread cohabitation and to the higher number of single people in the countryside because of an unfavorable demographic situation.

Cohabitation is more widespread among Estonians than or her nationalities in Estonia. 36% of first children of Estonians were illegitimate in 1987; 38% had their first child during the first 7 months of marriage. Hence, 74% of first children were conceived out of wedlock (Katus 1990).

The conclusion can be drawn here that behind the apparent stabilization of the divorce rate, an increasing variability in family formation is taking place.

## Variations in the divorce rate

The divorce rate varies a great deal within Estonia. As a rule, it is higher in urban areas and lower in rural areas; it is higher in regions with high immigration rates (especially in the northeastern industrial region) and the lowest in the Estonian islands and other old Estonian areas with a low immigration and industrialization level (Figure 1).

The highly industrialized areas are the result of the all-union ideology of binding all the Soviet republics together economically. For this aim large enterprises have been established in Estonia needing much labor force — for building them and working there afterwards. Thus these enterprises have been great instigators of migration for Estonia. As a result, the share of non-Estonians increased from 25.4% in 1959 to 48.5 in 1989 (Katus 1990).

## Length of marriages

The formal length of marriage is the time between two registrations: of marriage and divorce in the Registrar's Office. In spite of quite approximate data about the breakdown of marriages, we can estimate their duration.

Table 3 ja Figure 2 demonstrate that the first four years of marriage are the most dangerous for the stability of the marriage. According to the data for 1988, 32.4% of marriages ending in divorce in cities and 29.6% in the countryside lasted about four years. About one fourth of the marriages ending in divorce had lasted 5—9 years. 59.2% of the divorced in the cities and 55.4% of those in the countryside were not able to celebrate the tenth anniversary of their marriage.

The high percentage of the divorced whose marriage lasted about 4 years points to weaknesses in our society; it hints of insufficient family education and family counseling, but it also reflects the economical difficulties that the young couple has to meet.

Family education has been provided only during the last ten years to the pupils in the last two grades of secondary school, and not in all schools. The problem is

Figure 1. The variations in divorce rate in Estonia in 1988.

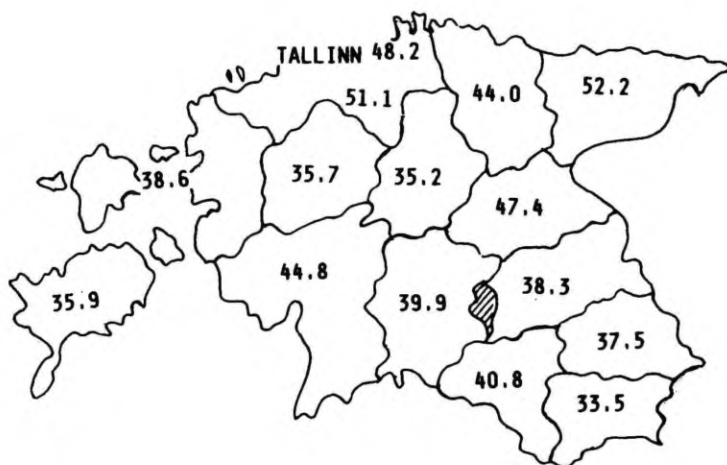
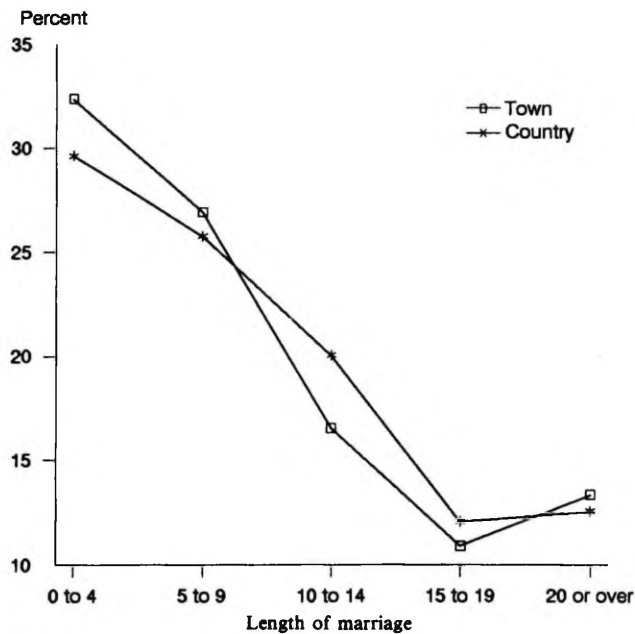


Table 3. Length of marriages ending in divorce in 1988.

Years	Urban areas			Rural areas		
	Number	%	Cumulative %	Number	%	Cumulative %
<1	172	3.1	3.1	11	2.8	2.8
1	358	6.5	9.6	17	4.3	7.1
2	433	7.8	17.4	38	9.5	16.6
3	431	7.8	25.2	28	7.0	23.6
4	398	7.2	32.4	24	6.0	29.6
5—9	1,483	26.8	59.2	103	25.8	55.4
10—14	916	16.6	75.8	80	20.1	75.5
15—19	600	10.9	86.7	48	12.0	87.5
20<	734	13.3	100.0	50	12.5	100.0
All	5,525			399		

Figure 2. Length of marriages divorced in 1988.



the lack of special teachers. Some family counseling has been available during the same period, but we lack a family counseling and psychological service system covering all of Estonia.

In Estonia families with small children and with many children live in quite bad economical conditions. According to data from a study made by the Family Laboratory of Tartu University, only 14% of the people included in the study have an average income per family member greater than 125 roubles, which is supposed to be the official standard of living, 15% of families live on an income under the poverty level, i.e. 50 roubles per family member (Trumm 1990). We have no fresh data about

the changed economical situation of families after the price increase, regulation of salaries and the new subsidy system inaugurated in October—November 1990.

Before 1989 maternity leave lasted only 1.5 years and after that a mother had to go back to work and most children attended preschool childcare institutions. The frequent illnesses of children depressed the whole family atmosphere. Starting in 1989 maternity leave was lengthened to three years and from the autumn of 1990 the mother has been entitled to an allowance during the entire leave, although unfortunately a very low one (see also Tiit 1990a).

The average length of marriage in towns was 6.6 years and in rural areas 7.5 years in 1988. In the country divorces occur less rapidly than in towns.

Compared to urban areas Estonian rural areas have preserved more social control over the people and neighborhood relations, which supports family stability. In rural areas, people more often have their own households, domestic animals and allotment gardens, all of which create common tasks and responsibilities and do not allow the couple to alienate themselves psychologically from one another. The rural way of life creates more barriers to the breaking up of marriage.

Unfortunately, nowadays Estonia is a highly urbanized country. In 1989 the urban population made up 71.6% of the whole population (Figure 3). A remarkable increase in the density of the population (Table 4) influences the relationships between people.

Figure 3. Urbanization in Estonia (Data of censuses).

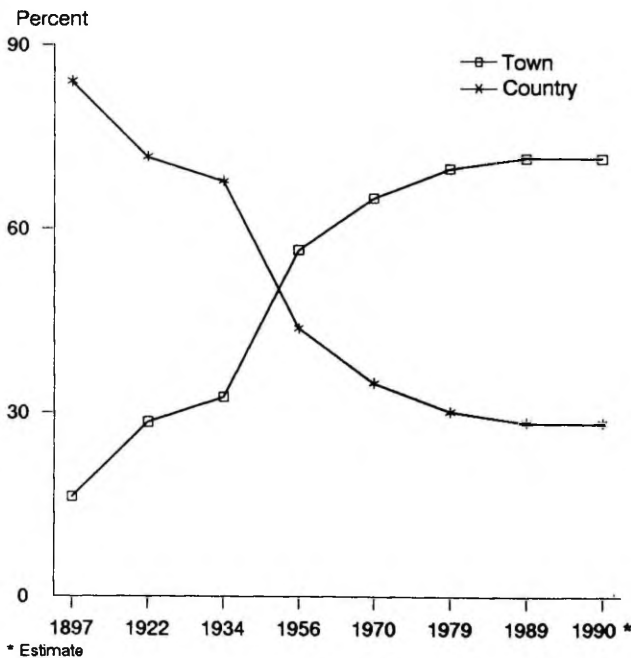


Table 4. Urbanization in Estonia (data census).

Year	Whole population in thousands	Percentage of population		Density per square km
		Urban areas	Rural areas	
1897	975	16.1	83.9	21.6
1922	1,044.1	28.5	71.5	23.1
1934	1,061.3	32.3	67.7	23.5
1959	1,196.8	56.4	43.6	26.5
1970	1,356.1	65.0	35.0	30.0
1979	1,465.8	69.7	30.3	32.5
1989	1,572.9	71.6	28.4	34.9
1990*	1,582.8	71.6	28.4	35.1

\* — estimate

In accordance with Soviet ideology, the aim was to eliminate differences between urban and rural areas. For this reason many small villages lost their inhabitants or only elderly people stayed there; the population moved to towns, town-like boroughs and the centers of collective and state farms. A town-like lifestyle in the centers of the collective and state farms has led to some undesirable features of urbanized society. Here these features became damaging: the possibility to hurt another person is much higher in a rural area because people know each other and their problems too well.

Life in towns and cities creates personalities without roots. About one fifth of the Estonian people live in their own houses, the most common dwelling is a flat rented from the state or an organization. A flat is not regarded as a home, but only as a place to live in. Life flows with hopes of moving into a more spacious flat. Therefore, families in towns in their rented flats have little to do with each other. Here lies hidden a lack in creating mutual responsibility and common tasks.

In towns people have many social contacts: many acquaintances but few friends. Individualization and alienation processes invade the marriage relationships more easily here because all family members have little time to be together. They even have different areas of interaction with their friends and acquaintances. The ground for psychological withdrawal of the spouses is evident.

### **The marriage order of divorced**

Among all people who were married in 1988, 28.7% of the men and 28.5% of the women were remarrying. The same year 27.6% of the men and 30.2% of the women among all the divorced had been remarried. We may conclude that first marriages and remarriages do not differ notably in stability: remarriages break up with the same probability as the first marriages.

The duration of remarriages which have been dissolved differs significantly from that of first marriages ending in divorce (Table 5). For remarriages the first two years of marriage are the most dangerous. During the first two years about 15% of first marriages are dissolved, but nearly one-third of the remarried were not able to celebrate their third anniversary. Almost three-fourths of all those who remarried in 1988 had been divorced during their first four years of life together.

The average length of the first marriages dissolved in 1988 was 7.6 years for men ja 7.0 years for women; the average length of remarriages was 5 years for both sexes. In comparison with the data for 1975, the length of marriages that ended in divorce had decreased about 1.5 years.

The fact that dissolved remarriages are shorter results from the special features of remarriages. People who remarry have problems different from those of their first marriage: there are problems connected with the previous marriage, ex-spouse, children, etc. Remarrying people are, as a rule, older than people who marry for the first time. They have their own previous experiences of being married that influence the remarital relationship. Some previously divorced people have personality features not suitable for marital life. And finally, previously divorced people have experienced the break up of their marriage which decreases their subjective barrier toward divorce.

### The national homogeneity of the divorced

In Estonia the two major national groups are Estonians and Russians, with Estonians forming the original nation. In the course of increase in national heterogeneity, nationally heterogeneous marriages have become more frequent. However, it is worth mentioning that national homogeneity has remained at quite a high level. In 1988 76.7% of all marriages concluded were nationally homogeneous (Table 6). The national homogeneity of Estonians was 84%, of Russians 57%. Russians form mixed marriages with Estonians more often than Estonians with Russians.

The next preferred nationality for Estonians was the Finns. In 1988 171 marriages were contracted where one of the spouses was a Finn.

An increase in nationally mixed marriages of Estonians and Finns and, at the same time a decrease in marriages between Estonians and Russians is to be expected.

Among the divorced the national homogeneity of the two major national groups is higher than among those married during the same year.

### Children

The children in a marriage are a painful problem for many couples intending to divorce. According to our data a surprisingly high percentage of the divorced had no children — 40.9% of the divorced in the urban areas and 43.9% in the rural areas.

Table 5. The length of marriages dissolved in 1988 (%).

Length of marriage (years)	Dissolved 1st marriage		Dissolved remarriage	
	Men %	Women %	Men %	Women %
< 1	2.4	2.2	7.2	6.9
1	5.0	5.3	13.0	12.3
2	7.4	7.2	11.2	12.0
3	7.6	7.2	9.6	10.2
4	7.0	7.3	7.4	7.4
5—9	25.7	27.1	27.4	26.3
10—14	17.4	17.0	13.5	13.7
15—19	12.1	11.7	5.9	6.3
20 <	15.4	14.9	4.8	4.9
	100	100	100	100
Average length of marriage	7.6	7.0	5.0	5.0

N — 5,924 divorces

Table 6. National homogeneity of the divorced in 1988.

Nationality	All		Spouses of the same nationality	
	Men	Women	Men(%)	Women(%)
Estonian	2,670	2,705	88.8	87.7
Russian	2,466	2,550	76.7	74.2

Table 7. Women's labor participation (%).

Year	1940	1960	1970	1975	1980	1985	1987
%	35	50	53	54	54	55	54

19.4% of divorces confirmed in the Registrar's Offices (couples without children) and another 20% without children through the courts. According to official court statistics, in 1988 in all Estonian courts 4,807 marriages ended in divorce. Of these 924 (19.2%) had no common children.

Moreover, Table 5 shows that in 1988 during the first four years of marriage about one third of all first marriages were dissolved. Among remarriages this share was significantly higher; among them are many childless couples. Unfortunately we have no data concerning this.

### Women and divorce

In Estonia divorce is very often initiated by the wife. In 1988 only 18% had common applications for divorce; more than 75% of all divorces were initiated by women.

One reason for this has been the stress on the legal equality of men and women in the Soviet Union, while the higher educational level and social activity of women in the Soviet society developed a comparably independent and emancipated type of woman. Sometimes even the problems of so-called over-emancipated women exist. An extreme type is the woman who does not need a whole family but only children. Her husband loses his importance after the realization of the planned number of children in the family.

According to the data for 1985 (Väike Statistikaogumik 1989) the share of women in the labor force was 54.8%. Estonian men work for an average of 32 years, but women for 36 years (Tiit 1990b). The employment rate of women has remained at its peak already for at least 20 years in Estonia (Table 7).

Moreover, women in Estonia make up 44.6% of leading workers and 73.6% of all kinds of specialists, 35.8% of the body of the Supreme Council and 49% of the bodies of local councils (Väike Statistikaogumik 1989).

Quite good possibilities for combining bringing up children and professional employment exist for women: 76% of children in urban areas and 50% in rural areas were guaranteed a place in day care (Väike Statistikaogumik 1989).

This high level of women's emancipation has been forced by the Soviet system where both sexes have to participate in society equally. As a result, Soviet women achieved much economic and psychological independence as well as self-awareness for resolving family crisis situations.

Table 8 shows that nearly three fourths of all women whose divorce was registered in 1988 were under 40 years of age. These are women of fertile age with every possibility to contract a remarriage, form a new family and make a career. The high divorce frequency has created a liberal social attitude towards the divorced which will give them the opportunity to remarry.

In 1988 5,924 women divorced, 74.5% of them were in the labor force. Over three-fourths were of fertile age. Obviously a great number of those outside the labor force were not all full-time mothers but were on maternity leave. Unfortunately we have no data on how many divorced women in 1988 had an under 3-year-old child at home.

Table 9 indicates that the higher the education level among women is, the higher is the labor participation rate. Higher orientation to work among women coincides with higher education.

## Discussion

Estonia has been a country with a high divorce rate from the 1960s, when a noticeable increase in the number of divorces began. The main social reasons for the increasing divorce rate have been rapid urbanization and industrialization, a high women's employment rate, an imbalance in family functions due to the low economical level of society.

The current situation in the Estonian Republic is unique. Estonia is fighting for her political and economical independence. The whole Estonian society is going through a reformation. This is a period when people need support from their fami-

Table 8. Women's age at divorce in 1988.

Age at divorce	Number	Cumulative %
<20	54	0.9
20—24	840	15.1
25—29	1,350	38.0
30—34	1,186	58.1
35—39	923	73.7
40—44	564	83.3
45—49	412	90.3
50—54	272	94.9
55—59	152	97.5
60 <	149	100.0

N = 5,902

Table 9. Occupation and education of divorced women in 1988.

Education	All	%	Working %	Mental work (%)	Physical work (%)
Higher	805	13.6	92.6	89.6	10.4
Secondary professional	1,456	24.6	90.5	55.5	44.5
Secondary	2,027	34.2	85.3	31.8	68.2
Secondary uncompleted	511	8.6	82.4	10.0	90.0
Primary	333	5.6	67.0	4.9	95.1

lies to feel safe in a changing world. Such a situation binds the Estonian people together in order to reach common goals, such a situation binds family members together to meet and overcome new social problems.

On the other hand, the crisis in Estonian society is reflected in the family both economically and mentally, it creates new problems and destabilizes family relationships.

What might be the perspectives for Estonian marriages?

1. A continuous rise in age at first marriage is to be expected. Young people will be more oriented to the economical security of their own marriages. Many young singles will move abroad to study or work for some time and they will not marry until after returning. Cohabitation will increase among young persons and among the divorced and widowed.
2. The national homogeneity of Estonian marriages will rise on account of a decrease in marriages between Russians and Estonians.
3. The length of marriages which will end in a divorce will shorten as a consequence of the continuing social crisis: many people will not be able to adjust to a new economy and will suffer from the problems of security; sexual liberation will deepen the moral crisis in society.
4. Social and family policy will impose special importance on building up the welfare of families.

In conclusion, a noticeable increase or decrease in the divorce rate in Estonia is not to be expected. It will still remain at quite a high level.

## References

- Eesti arvudes 1989 aastal (1990). Lühike statistika kogumik. Tallinn.
- Eesti NSV rahvamajandus. Statistika aastaraamat 1988 (1989). Tallinn.
- Katus, Kalev (1990). Demographic trends in Estonia throughout the centuries. Yearbook of Population Research in Finland 28: 50—66.
- Tiit, Ene (1990a). Family policy in the Estonian SSR, 1940—1989. In: Family Situation and Family Policy. Family Problems VIII, pp. 15—27.
- Tiit, Ene (1990b). The status of woman in society and the family. Paper prepared for the scientific conference »The Baltic Family» held in Kaunas (Lithuania), 16—20 October 1990.
- Trumm, A. (1990). The living conditions and income of the Estonian family. In: Estonian Population and the Family. Family Problems X, pp. 43—59.
- Vikat, Andres (1989). Formation of Families. Population Studies. No. 11. Series B, Working Papers. Tallinn: Estonian Interuniversity Population Research Centre.
- Väike statistikakogumik (1989). Tallinn.

\*Paper given at the XIIth World Congress of Sociology, 9–13 July 1990, Madrid, Spain.

## **FAMILY DEVELOPMENT AND DIVORCE IN ESTONIA: EMPIRICAL RESEARCH**

Dagmar Kutsar

II

A characteristic feature of Estonian family is high divorce rate - during the last ten years about 45-48% from the number of marriages per year. High divorce rate was the reason for studying family development and breaking up problems. The Family Research Laboratory of Tartu University carried out some representative for Estonia questionnaires of 1150 newlyweds, 540 young couples after their 5 years of marriage, 470 families with dependent children and 950 divorcees in the years 1972-1984.

In the course of studying divorcing people we became aware, that for better understanding the breaking up processes of the family we must study also the family formation and function processes. For this reason we studied all the groups of families we had questioned in comparison.

*We had two levels of analysis.*

**1. Macrolevel analysis** - it revealed the reflection of macroprocesses in the society on the family life.

Estonia, one of the 15 Soviet Socialist Republics, is a highly urbanized country. About 70% of its 1.5 million population live in towns and cities. Women's educational level is higher the men's one. Women's employment rate is in its real maximum and their work system is rather rigid, highly regulated. Family service system is not well-developed and many families experience economic troubles. The family institution has not been so highly valued as social and professional work at the official level.

Children, as a rule, leave homes to visit preschool institutions too early. Mother leave for 3 years has legislated in 1989 only, before it continued 1-1.5 years. So, family members have little time to be together. Our inquiry of family functions of the families with children revealed, that up to 50% of families with dependent children have only one meal together per a working day, 20% of spouses have close common friends. In the family group people have their tensions and quarrels more often than elsewhere and the most often object of one's angry, it is spouse.

From this very brief overview reveals that socio-economic situation of the Soviet society has not supported the families enough. Families suffer from unbalanced functioning: due to the poor economic level of the society the economic function of the family needs lot of time and resources from the family members. At the same time family recreation, therapeutic and socialization functions are underloaded.

On the other side, urbanized environment has its socio- psychological impact on the quality and stability of the families. The main problem of many families, it is the saving of psychological closeness of family members and satisfaction of their emotional needs. Individualization and alienation processes invade the family relationships, including children. Premarital high expectations about love, warm and understanding relationships have great possibilities to break.

Our material of newlyweds shows that the most frequent motives to get married - mutual love, closeness, turn over and become the most frequent motives for divorce on the ground of questionnaire of divorcees (love has disappeared, misunderstanding and mistrust relations have taken place, etc.).

It was shown that unbalanced functioning of the families and psychological alienation processes of the family members, determined by macro-processes, have negative impact on the family stability.

**2. Microlevel analysis** - it explains the inner processes of the family functioning.

*This study consisted of 3 parts.*

2.1. Hypotheses on marriage stability. The survey dealt with the general regularities of the formation of married couples on the basis of the investigations of marrying people in the Estonian SSR. Many hypotheses on the prosperity of the married life, well-known by sociological literature (E. Burgess, 1957; R.B. Cattell, J.R. Nesselroade, 1967; J. Epstein, 1975; G.A. Kooy, 1975; R.F. Winch, 1971, a.o.) were controlled.

The following implications of the general regularities in the formation of married couples have been considered:

1. The lowering of the age of marrying as well as remarrying. In 1959-1972 the age of marriage in Estonia has lowered on the average by 2.7 years for men and by 1.9 years for women. Marriages among people of equal ages became more frequent.

In the middle of seventies the age of first marriage stabilized and by nowadays we can notice its rise.

2. During the past 30 years the level of education in Estonia has increased by 2.7 years for men and by 4.0 years for women.

3. The increase of remarriages confirms the marriage as a worth in the society.

4. The premarital sexual permissiveness increases, as does the number of sexually experienced couples; sexual relations between partners who intend to marry are considered permissive and natural.

5. Mutual trust, acceptance, honour, companionship are the most appreciated values among the Estonian marrying people.

6. As a result of women's equality with men, 90% of Estonian marrying people consider an equal division of home tasks preferred.

It may be inferred from the hypotheses of different authors and our data with certain probability that an "adequate couple" can be formed by the spouses marrying at an optimal age, coming from well-to-do families from the country or smaller towns, having a more or less equal educational level, rather similar characters and main values.

It was revealed that the spouses' socio-demographic and socio-psychological characteristics function as risk factors or personality resources when problem situation occurs.

2.2. The analysis of self- and mutual character estimates. All the respondents (future spouses, married couples and divorcees) estimated their own and their spouses' characters at the moment, but the divorcees' retrospective estimates for the beginning of marriage were included.

Each measuring block in the questionnaire consisted of 32 pairs of opposite character features to be estimated by a 5-grade scale. In the course of analysis 7 socially preferred character features that are good indicators of partners' interaction were revealed. These opposite features were: honest - dishonest; tactful - tactless; affectionate - heartless; conscientious - unconscientious; trusting - distrustful; friendly - unfriendly; orderly - disorderly.

The analysis revealed statistically essential differences in the quality of relationships as well as in the estimations of the respondent's and the partner's character features of the three groups questioned.

1. Newlyweds were overwhelmingly in love, their orientations to one another were highly positive. The idealization of the spouse was mentioned: mutual estimations were essentially more positive in comparison with one's self-estimates as well as the self-estimates of the respondent.

2. The same people after five years of marriage fell into two groups denominated by us "successfully" and "unsuccessfully" married. As a rule, the estimates of one's own and partner's character were closer now. Successful spouses, who estimated their relationships rather good, maintained their positive orientation concerning the spouse, but unsuccessful spouses had a tendency not to estimate the partner's character as positive as one's own.

3. People, intending to dissolve their marriage, were characterized as highly critical to one another. Distrustfulness, untactfulness, as well as high

dissonance in the estimation of one's own and partner's character were mentioned. As a rule, the estimates of spouse's character were essentially lower than those of one's own.

We can say that the image about one's spouse consists of social attitudes towards him; it changes when the family relationships will change and influences the interaction pattern in the family.

2.3. Study of informal stability of the family was directed by the theory of R.A.Lewis and G.B.Spanier,1979.

The Index of the Quality of Spouses' Relationships was formed from the estimates of mutual love, spouse's support estimate and from the estimate of satisfaction with one's marriage. The correlation coefficient of the pair was 0.48 while the estimates of wives were more critical.

Some other indexes of the pair on the ground of more influential upon the spouses' interrelationships parametres were formed. Mainly they were satisfaction estimates, that gathered into the determinants of the quality of spousal relations and the informal stability of the couple. The Regression Analysis was processed.

The determinants of the quality of spousal relations were:

1. Socio-economic adequacy of the couple, consisted of pair indexes - satisfaction with education level of the pair; satisfaction with the social status of the pair; satisfaction with money management. Determination power upon the quality of spouses' relationships (regression coefficient) 0.43 for men and 0.45 for women.

2. Social adaptation of the couple, consisted of pair indexes - satisfaction with leisure time, relation with parents, friends of the couple. Determination power upon the quality of spouses' relationships 0.49 for men and 0.47 for women.

3. Marital adaptation level, consisted of pair indexes - satisfaction with one's habits, sexual relations; level of conflicts, mutual information about oneself and satisfaction with the homework load. Determination power upon the quality of spouses' relationships 0.81 for men and 0.80 for women.

4. Personal resources of the couple consisted of pair indexes that were formed from the differences in self- and mutual character estimates of 7 socially preferred character features, named above. Determination power upon the quality of spouses' relationships 0.68 for men and the same for women.

The determinants of couple stability were:

- 1.The factor of alternatives that was formed from the parametres: one is thinking about divorce and somebody as a better alternative partner exists. The determinant power upon the quality of spouses' relationships 0.53 for men and 0.59 for women.

2. The factor of barrier against the breaking up of one's marriage that was formed from the parametres: orientation on stable marriages at all and

on one's marriage. The determinant power upon the quality of spouses' relationships 0.53 for men and 0.46 for women.

It was revealed that informal stability of one's marriage is determined by the quality of spouses' relationships and the subjective evaluation of marriage break-up probability. The informal stability of one's marriage in a great deal determines one's behavior in his family.

In conclusion, to study the breaking up of the family one has to integrate micro- and macroanalyses into systemic approach that supposes the existence of psychological and sociological understanding of the family functioning. Divorce-study will be more informative in the case of studying future spouses, marital couples and divorcees in comparison.

#### References:

- Burgess.E. Mate Selection. - In: Fishbein,M.,R.Kennedy (Eds.), Modern Marriage and Family Living. N.Y.,1957.
- Cattell.R.B.,J.R.Nesselroade. Likeness and Completeness Theories Examined by Sixteen Personality Factor Measures on Stably and Unstably Married Couples. - Journal of Personality and Social Psychology, 1967,7.
- Epstein.J. Divorce. An American Experience. Lnd.,1975.
- Kooy.G.A. The Declining Age of Marriage in the Netherlands of the sixties: A Possible Sociological Explanation. - Sociologia Neerlandica, 1975,1.
- Lewis.R.A.,G.B.Spanier. Theorizing about the quality and Stability of Marriage. - In: Burr,W.R., a.o. (Eds.),Contemporary Theories about the Family: Research-Based Theories. Vol.1. N.Y.,1979, 268-294.
- Winch.R.F. Need Complementarity Reassessed. - In: Anderson,M. (Ed.), Sociology of the Family. Harmondsworth, 1971.

## COUPLES IN AN URBANIZED SETTING: EXPECTATIONS AND REALITY

Dagmar Kutsar

### 1. Introduction

Estonia is characterized by high level of urbanization. If in 1960 the urban population of the republic made up 57% of the whole population, in 1970 - 65%, then in 1989 this per cent was already 71.6. On the territory of Estonia, that is on 45 000 km<sup>2</sup> 33 towns are placed, 5 of them of republican subjection and 26 settlements of urban type (Eesti NSV Rahvamajandus 1987.aastal, 1989). The centres of collective and state farms have obtained quite an urban look as a result of official population and economy policy. So they also have many features that characterize the urban way of life.

According to the official data of Estonian Statistical Office, the average per cent of divorced reached by 1983 - 48.9% from the number of marriages concluded during the same period (table 1).

Table 1. Number of marriages concluded and divorces gained in the years 1975-1988 in Estonia

Year	Marriages	Divorces	Divorce rate
1975	12 443	4845	38.9
1976	12 312	5203	42.3
1978	12 580	5657	45.0
1979	12 784	5994	46.9
1980	12 964	6127	47.3
1981	12 825	6037	47.1
1982	12 263	5901	48.1
1983	12 917	6313	48.9
1984	12 530	6194	49.4
1985	12 861	6017	46.8
1986	13 000	6039	46.5
-----			
1988	12 973	5924	45.7
<i>Among them:</i>			
Towns	11 037	5525	50.1
Country	1 936	399	20.6



We can notice a little decrease in divorce rate from the year 1983. At the same time there is a little tendency towards the increase in nationally homogeneous marriages. In 1986 there 75.6% of all marriages concluded were nationally homogeneous, in 1988 this per cent was higher - 76.7%. A continuous increase of nationally homogeneous marriages among Estonians is expected. There is a big difference in divorce rate in towns and country.

It is quite clear that the socio-psychological processes that take place in a family as in a small social group, can be explained in more wider social context. To eliminate the effect of the macroprocesses on the family, their reflection on the family relationships would be purposeless. The social surroundings where the concrete family lives and functions create the outer conditions for its existence.

The personalities of the family members and socio-psychological rules of their mutual effects create the inner conditions for its existence. From the facts given above one can draw a conclusion that the social surroundings have their impact on the family life and thus on certain level they do direct the family processes.

### 1.1. Town as a living environment

Town as a living milieu gives many possibilities for thorough development of personality but it takes a lot of energy and desire for reaching one's aims; it creates nervousness and stress but also pleasure from the interaction with other people. The urban way of life - first of all it means a great number of social contacts: there are lots of acquaintances but only a few of them are real friends. The members of the family have friends their own and their everyday interaction fields are often different because the major part of the day the members of the family are separated by different work and study places. The special feature for Estonia is the high women's occupational level. Already by the data of 1979 census 96.4% of women capable for work were engaged out of home. This caused childrens' leave from homes too early to attend preschool institutions.

In the town among the masses of people a person remains anonymous. His experiences, wishes, strivings are of little interest for others. The most important of all is that he shouldn't break the general rules and norms of behaviour e.g. shouldn't break the communal order. For this reason the urban people are often unattentive, rough and indifferent to each other. The first place is taken by relationships based on consuming different goods and personal welfare.

In a developed society to a person is set forth a choice from different possibilities of action as the norms of behaviour are more pliant here. But the more anonymous or unguarded the situation is, the smaller the number of people to whom one has to explain his behaviour is and the more freedom one can take. In more anonymous or unguarded situation a person can have a choice between the alternative activities: one can act accordingly to traditional rules or norms and in connection with that the choice wouldn't be so attractive or take certain freedom and behave according to the way that attracts him most without having any great pains. The anonymity of behaviour deepens the process of individualization, the second aspect that together with the emotional alienation is the real reason for the arise of the feeling of irresponsibility especially for those persons who have only a weak feeling of responsibility for others, for one's family, for one's spouse.

In a society, in more wider aspect, the irresponsible behaviour is made possible by the formalism that ruled in our society during the period of forced socialism, when the collective responsibility meant really that everybody, not one person, were responsible.

Irresponsible behaviour is in many ways caused by the urban way of life: by the individualization of a personality, by secularization of life, by the appearing of the consumers'tendencies in communication, by alienation from the environment and the other people, withdrawal from one's family. Irresponsible behaviour in one's turn favours the slackening of psychological bonds between the spouses and alienation from one's family.

## 1.2. Formation of the family's individual environment in an urban setting

The urban way of life generates the individualization of personality. The psychologists of environment research have showed that the aspiration to hide one's inner world from the others is a phenomenon that has historically developed comparatively lately and that can be connected with more higher level of the development of personality. The more the personality has developed the more he wants to isolate himself from others. Social isolation from other people gives to a man some feeling of independence from others and from the effect of the surroundings in all (Heidmets, 1981). Very often our too tense dwelling conditions don't offer any possibility to separate from other members of the family if it is needed.

From the other point of view Perlman and Fehr (1987) suppose that the importance of close relationships between other individuals keeps historically growing. It can be told quite firmly that the contradictoriness between emotional needs and ability of expressing one's good feelings and experiences towards other persons is growing more acute. The practice of family counselling shows that the number of people, also young ones, who suffer from the inability of interaction or creating closer relationships with other people, is growing.

Emotional alienation as one expression of individualization of personality in a social sphere reflects on the relationships between spouses as the lack of empathy, at the same time the person himself is sensitive of the lacking of gentleness and love from his partner. So emotional dissatisfaction appears: the number of conflicts between the family members, grows, also the discontent with one's spouse and marriage as a whole. Appears aggressiveness, even roughness of realtionships between each other. Nervousness of the domestic atmosphere from one side and engagement of parents with their own affairs and troubles from the other cause dissatisfaction of the emotional needs of children. Here the main determinant of the shortage of the emotional socialization of children lies. The results of it are the bursts of agressiveness and cruelty among the young generation. Agressiveness and cruelty of youngsters, their acts of vandalism - these are serious problems of especially the new districts of our towns.

The danger of psychological withdrawal and alienation of the family members from each other appears in the young families already. In average the number of children in families is small and the most part of them start to attend the creches and kindergartens from the very first years of life.

In urban dwellings there are few possibilities for joint activities, the number of joint commitment of spouses is small as well, especially when the children have got older already. The psychologists on environment say that the nowadays way of family life is adapted to the possibilities and time balance of a woman, engaged with work, at the same time there isn't left anything for a man to do in an urban dwelling. "In a family with

restricted activities where it is impossible to divide domestic activities", confirms J.Kruusvall (1981), "the husband starts to act against the traditional way of domestic life (bringing up children, etc.) and tries, using his social position, to create himself comfort and domestic peace, which, in fact, doesn't satisfy him".

In connection with the reduction of joint activities of the family the commitments connected with them have become more and more undistinguishable. Data from the researches of the environment shows that in most urban dwellings the rooms have been divided between the family members (with the exception of the living- room). 80% of families don't want to have a passage way from the living-room to the other rooms. Thus in the urban dwellings the personal division of rooms dominates before the functional division of them (Kruusvall, 1981).

The urban dwelling creates people without roots. Here the number of things made by oneself is small: the dwellings, built according to standard plans are meant for standard furniture. Thus the dwelling remains only a dwelling, it will never be a real home.

Physical separation from other members of family is the ground for psychological withdrawal (e.g. alienation). From here the alienation process from the surroundings and from the other people begins and here it continues.

In the course of the dissemination of urban way of life also the character of family life changes. The urban surroundings have their influence on people as well as directly and indirectly (e.g. through the means of mass media, through the subculture of the population, etc.), one's norms, values, attitudes. At the same time it gives to a person more freedom of behaviour, freedom to do its own choice. As it follows the events can be placed under control of the person who takes part in given situation, in the conditions where the sanctions from the society have grown milder. Such situation in a way, acts as an expression of the freedom of the personality and his autonomy. First of all it means free choice of a spouse, free contracting of a marriage and free choice to divorce it.

The important place in family functioning is taken by the psychological processes in a family like in a small social group. One of the most important family problems it is the question of maintaining of psychological closeness with the spouse. With what hopes and expectations people marry, what are their motives to form a family and how will look like the reality? What personality features affect the spouses' relations and what attitudes they keep to one another? What binds together couples? These are the questions of our next analysis.

## 2. Sample

The Family Laboratory of Tartu University carried out a longitudinal research among the population of the Estonian SSR. The first stage of this research - investigation of people intending to marry - was provided in 1972. The sample was 1150 people, that is 575 future couples, intending to get married, mainly urban people.

The second stage - investigation of young married couples who had lived together for five years - was provided in 1977. The sample of this research was smaller, 540 people were chosen, among them were 202 couples.

The third stage of this research began in 1984 - the investigation of spouses with minor children. Into this research were also switched people questioned twice already.

A choice was made among those intending to get married. It consisted of people who had recurrent information, at the same time people who had been divorced or failed to come to get married were not included. In all this choice compared 238 couples intending to marry and 199 young married couples.

For 91% of people questioned this concrete marriage was the first, 3/4 of them were Estonians, 61% of men and 30% of women were workers, correspondingly 8% of men and 44% of women were civil servants, representation of other social groups wasn't remarkable. More than a half of those questioned had uncompleted secondary education, about 1/4 had eight-class-education and about the same number of people was made up of those with higher education.

Mostly the people questioned live in Estonian towns.

## 2.1. Expectations from marriage

### 2.1.1. Motives of people intending to marry and retromotives after five years

In this research to people intending to marry a list made up of 14 motives was given, from the repeated research two rare motives - "a wish to get better position (status)" and "wish to have children" - were expelled.

Every motive was to be estimated in three-point-scale: 1-very important; 2-important; 3-without any importance.

In the following we are going to use only these motives we have got after carrying out two interrogations (Table 2).

Motives are not independent. With the help of the method of Factor Analysis they can be divided into three factors:

1. Emotional and ethical motives (motives 1-3)
2. Motives of self-realization (motives 4, 5 and 7);
3. Motives of debt and conventionality (motives 6 and 8-11).

More completely represented among both people intending to get married and after five years of marriage were motives from the first group of factors. Love, desire to live with a faithful friend, to be side by side with a tender and fostering person is connected with great importance of ethical- emotional relations between spouses. Important motives for contracting marriage are also motives of the factor of self- realization. In our country young families have always gained their own separate home from parents. The role of motives of debt and conventionality is smaller. These motives describe some kind of exclusive situations to get married. Quite a confusion is created by popularity of the motive of "a child-to-be" for contracting marriage.

In table 2 became evident, accordingly to which the retrospective role of motives given - both of highly affirmative or indifferent character - is essentially lower. This result is apparently connected with different situations of estimation - after five years the motives of getting married will lose their personal meaning and therefore the respondents will spot only motives that have been more important for them.

Table 2. Motives of getting married (% of people questioned, considering the motive ("important" or "very important"))

Motives	Future couples		Real couples (retrospect.)	
	M	F	M	F
1.Love	96.1	97.4	71.7	75.4
2.Desire to live together with a faithful and reliable friend	95.4	97.8	52.8	60.0
3.Desire to live together with a tender and fostering person	89.7	95.0	31.1	39.4
4.Desire to have a home of smb's own and to get independent	83.8	87.8	52.3	51.1
5.Desire to be materially ensured	60.4	65.9	22.0	21.0
6.Desire to legalize one's intimate life	64.9	63.1	23.9	26.2
7.Desire to require the position of a married person	44.1	41.3	9.3	9.5
8.Fulfilling a promise given earlier	43.3	38.6	12.9	9.9
9.A child-to-be	41.2	41.5	21.0	26.2
10.Fright of loneliness	22.8	23.6	7.8	12.2
11.Parents' request	21.7	22.6	5.5	6.9

## 2.2. Value orientations of people intending to get married

We set forth for the people intending to get married a list made up of 24 values and asked them to estimate the values using a four-point-scale: 4-very important; 3-important; 2-not very important; 1-without any importance.

The values were divided into five big groups: intellectual, emotional, ethical, economical and also children as a value of marriage.

Motives of marriage and value orientations are deeply connected. Values quoted more highly have greater importance for motivation of a marriage also. From the other point of view, these values determine the expectations from one's marriage.

Emotional and ethical values that get in touch with the relationships between spouses rise to the fore: mutual respectfulness, faithfulness, confidence, understanding of each other, love and tenderness (Table 3). Material security as a marital value is quoted rather low, although material security does not possess so modest place when we are talking about the motivation of marriage.

As a rule, women estimate all the values given more highly than men. It is connected with women's considerably higher demands to marriage and husband-to-be. Especially they tend to stress the importance of politeness, tenderness and gentleness to each other, the importance of free time spent together, also division of domestic works. The values enumerated that are highly estimated by women seem also to be the main ground for conflicts in marriage.

Table 3. Value estimations of people intending to get married (% of people questioned, considering these values to be "important" or "very important")

Values	Future spouses			
	"Very important"		"Important"	
	M	F	M	F
1.Faithfulness of spouses	78.4	85.0	20.8	13.7
2.Mutual respectfulness	81.9	90.2	18.1	9.4
3.Mutual understanding	73.4	82.6	26.6	16.6
4.Mutual confidence	75.5	81.7	24.1	17.9
5.Love	62.5	71.5	33.8	26.8
6.Tenderness and gentleness	63.7	79.2	36.3	19.6
7.Free time spent together	49.4	66.4	42.6	30.6
8.Politeness	47.3	66.0	50.2	33.6
9.Presence of children	45.3	57.9	47.5	36.6
10.Domestic comfort	44.3	51.1	49.8	44.3
11.Patience	34.8	42.7	59.8	53.4
12.Sexual harmony	36.5	43.3	54.9	49.4
13.Practicalness	33.1	33.8	61.4	62.0
14.Husband (wife) takes care of one's appearance	34.3	37.2	58.9	57.7
15.Abstainence of a spouse	30.9	38.2	46.6	44.2
16.Husband (wife) accepts habits of a spouse	16.1	24.6	69.9	68.1
17.Unity of views	23.3	22.6	48.7	52.3
18.Unity of interests	18.2	28.9	55.9	54.5
19.Relations of my wife/husband with my relatives	20.8	26.8	55.9	60.0
20.My relations with the relatives of my wife/husband	17.9	29.9	58.5	56.8
21.Unity of tastes	14.4	13.3	50.6	60.3
22.Division of domestic chores	17.0	35.2	55.5	51.1
23.Home of your own	32.4	27.8	10.7	13.5
24.Material ensurance	8.5	8.1	33.9	32.3

### 2.3. Realization of marital expectations

From above said a conclusion can be drawn that people intending to get married can be characterized by some kind of latent heterogeneity that hides behind heightened marital expectations depending upon relations between spouses. Success of their marriage can be foretold to some extent in order of their social-demographic and social-psychological distinctive characteristics.

Proceeding from the seeming homogeneity of people intending to marry we analysed them as one entirety. After five years of marriage so-called latent heterogeneity was replaced with actualized heterogeneity that leads us to an instant necessity of observing young marital couples in separate groups. As the ground for division we chose the quality of spouses' relationships.

Quality of spouses' relationships is an integral characteristic that consists of subjective estimations assumed by spouses through their relationships. To this index estimation of mutual attachment, estimations of compatibility of characters and clashing of relations, and general estimation of successfulness of one's marriage are included.

These estimations named here are included to the index of the quality of relations between spouses with two considerations:

1. They express the realization of premarital expectations that characterize ethical and emotional relations between spouses;

2. they express the inner balancedness of marriage that turns out to be the main determinant of informal stability of relationships between spouses, and, therefore, the family formal stability, too.

Characterizing of the quality of relations between spouses - it is a scale that varies from 1 to 24. The relations between spouses getting from 0 to 8 points are estimated as these of "low quality"; from 9-16 points as these of "average quality"; 17-24 points as these of "high quality". The correlation coefficient between the indexes of the quality of relations between spouses is equal to 0.48 (statistically sufficient).

Table 4. Division of spouses considering the index of quality of their interrelationships (%)

Quality of spouses' relationships				
	Low quality	Average quality	High quality	N
M	11.1	27.6	61.3	199
F	11.6	44.2	44.2	199

Division of spouses taking into account their relations (Table 4) expresses for more higher level of criticism from the wives' side as for complicated marital relations in their families.

Further on we are going to compare two extreme groups - the so-called couples of "low quality" with a low level of the quality of spouses' relations and of "high quality" with a high level of quality of spouses' relations.

How the premarital expectations will be realized we are going to observe by three blocks:

1. Some personality features of the spouses;
2. attitudes of wife/husband towards the spouse answering questions;
3. circumstances that support the closeness of spouses and bind them together.

### 2.3.1. Some personality features of a spouse affecting the spouses' relations

We set forth a list made up of ten characteristics and asked to estimate their expressions both for the person answering and his/her spouse in four-point-scale: 4-expressed strongly, 3-expressed on the average, 2-expressed weakly, 1- not expressed at all.

These characteristics are chosen so that the first three are of positive essence, they can be observed in context of elevating the quality of the relationships between spouses

in the role of its resource, and from four to ten - in the way- are expressing the risk that lessens the quality of relationships between spouses.

The persons answering can be characterized by quite a high level of self-criticism (Table 5).

Both men and women declare that they have two features from the group of "low quality" - abruptness and being easily offended, that have affect on their relations with spouses. As good characteristics they state to have sympathy, understanding and ability of interaction. Existence of these characteristics apparently in a way helps to soften negative qualities of the partner and to compensate the shortages of one's own, although sometimes they can express justification of the behaviour of one's own.

People questioned from the group with bad relations between spouses very often say that life companions are very abrupt and very seldom - that they have empathy and ability of understanding. Existence of these last features is mostly stressed by married couples with relations of high quality.

Women from the group with the relations of low quality complain about one and a half times more than the women of the other group that one of the spouses is dominating. Domination over men is characteristic to emancipated women and it has bad

Table 5. Personality features of spouses affecting the spouses' relationships (%)

Feature	Spouses' relationships							
	Low quality				High quality			
	Self-estim.		Mutual estim.		Self-estim.		Mutual estim.	
	M	F	M	F	M	F	M	F
1.Pliancy, adaptability	5.9	13.6	0.0	13.6	12.5	15.9	7.7	12.2
2.Empathy, understanding	17.7	27.3	0.0	4.6	20.2	36.1	8.2	39.8
3.Ability of interaction	5.9	31.8	11.8	27.3	23.3	21.7	21.2	27.7
4.Easily of-fended	11.8	36.4	29.4	22.7	14.4	29.3	25.0	11.0
5.Receptivity to stresses	0.0	13.6	17.7	4.6	6.7	3.7	4.8	0.0
6.Abruptness	17.7	45.5	52.9	45.5	12.6	26.8	17.3	12.2
7.Predomina-tion	17.7	18.2	41.2	27.3	8.7	13.4	14.4	9.8
8.Caprisci-ousness	5.9	13.6	41.2	18.2	1.9	8.5	8.7	2.4
9.Jealousy	11.8	13.6	35.3	27.3	5.8	3.8	4.8	6.3

effect on the relations between the spouses. So- called couples of quality domination over one of spouses is observed more seldom.

Persons questioned from the group of high quality relations declare that both of them are good in interaction, empathetic and can understand the other side. These are the

most important features that guarantee high level of relations between the spouses. As negative features they bring up being easily offended and abruptness. Abruptness is also tightly connected with general culture of interaction. Relations between people, and especially spouses, tend to act as a kind of a "boomerang". Every bad behaviour or unthought word that is aimed at partner will finally act against the subject as something that will reduce other person's estimation of him as a personality.

Effect of a "boomerang" appears to be one of the risk factors of the spouses' relationships and their stability for all spouses.

### 2.3.2. Some characteristics of an attitude of wife/husband towards the spouse answering

Into the questionnaire for young married couples were switched eight circumstances that characterize the attitude of wife/husband towards the spouse answering. They had to estimate characteristics given according to three-point- scale: 3-very essential influence; 2-essential influence; 1- influence is not essential (Table 6).

Table 6. Characteristics of a wife/husband about their attitude towards the spouse answering (considering their relations between each other to be "very essential influence" or "of essential influence")

Characteristics of spouse's attitude	Spouses' relationships				
	%	Low quality		High quality	
		M	F	M	F
1.Spouse's character		66.6	80.0	72.3	69.5
2.Tending and gentle		55.6	10.0	71.4	76.5
3.Attentive and polite		33.3	0.0	61.4	76.5
4.Respectful		33.3	10.0	73.1	77.6
5.Accepting spouse's habits		22.0	0.0	67.8	65.1
6.Accepting spouse's hobbies		22.2	10.0	64.7	54.7
7.Accepting spouse's profession		33.3	10.0	60.2	59.3
8.Empathizing with the feelings of joy and worry		22.2	10.0	76.4	81.4

In the group with the relations of low quality the spouse's character turns out to be of influence on these relations. Comparatively great importance of this circumstance is also implied by the group of couples with good relationships.

Spouse's character - it is the only distinctive symptom that has hiddenly got a meaning that can be understood in two ways. Whereas concrete qualities weren't presented, the person answering proceeded from the character features important for him in connection with what the influence of these on the relations between the spouses in the groups examined cannot differ.

The characteristics of attitudes remaining (from 2 to 8) in the table 6 have got a good influence on the relations between the spouses. These attitudes towards the spouse are the real ones that guarantee fulfilling of the person's emotional needs of intimacy, understanding and acceptance.

In the group of questioned these with relations of low quality all these attitudes are represented descreetly in comparison with the group with high quality relations. None of the women from the group with the relations of low quality answered that they indicate attention towards polite behaviour from their husbands and that the husbands had got an understanding attitude towards their habits. Influence of the other attitudes given was also regarded as a factor of no importance. At the same time we have to say that one half of men confess tending and gentle attitude of their wives towards them. We can see that in the pairs with relations of low quality exists lack of tolerance towards the spouse.

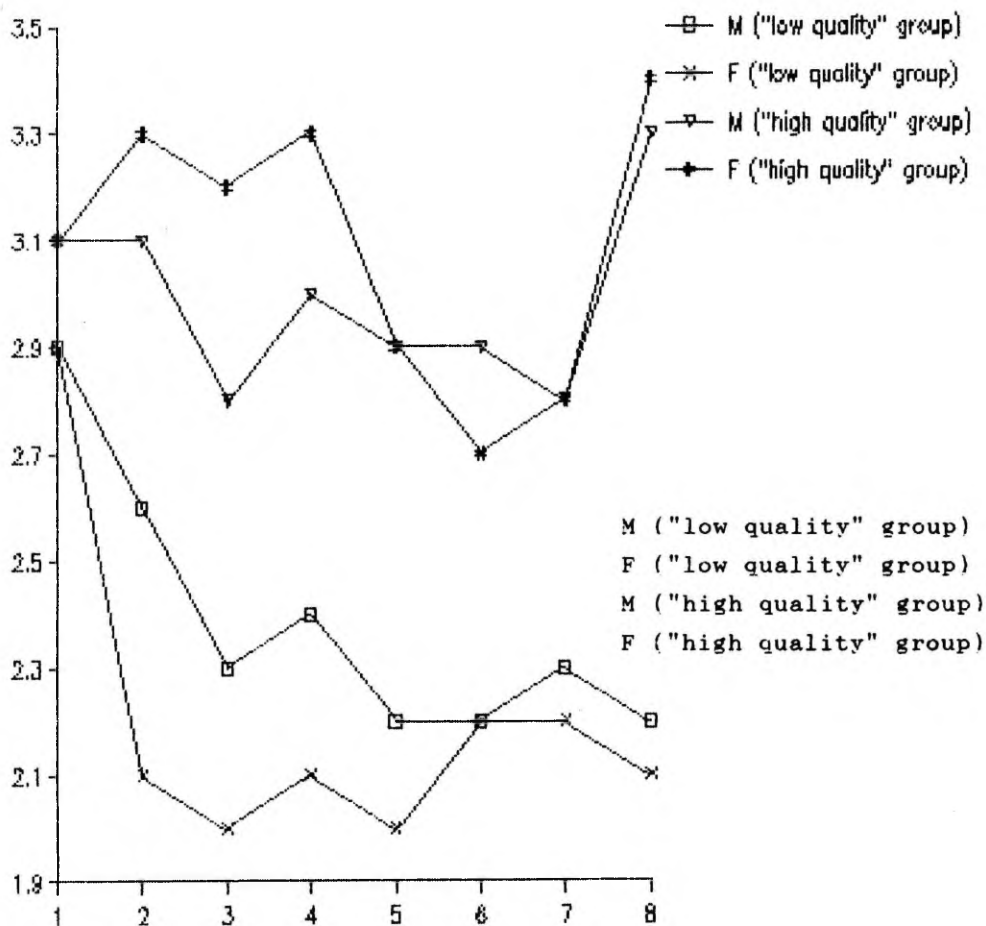
When estimating the attitude of a spouse towards the person answering it appears that there exists a rule: in a group with the relations of low quality the opinion of women is in average more negative than that of men; at the same time in the group of persons questioned with relations of high quality the opinion of women is in average more positive than that of men (figure 1). The same tendency can be found when analysing mutual and self character estimations of persons intending to marry, young married couples and divorcees. It turned out that at the same time of getting married on the background of high emotional tonicity and heightened marital expectations brides overestimated their husbands-to- be both in comparison with these estimates that men imputed to them and also self-estimates. Absolutely in the other way round acted divorcees. The mutual estimation of men given by women was definitely lower. That result speaks about women's dependence of situational factors and the effect of "boomerang".

Much more higher, comparing two groups of young couples, turned out to be the influence of wife's/husband's ability of empathy. The families where spouses share each other's feel other's feelings of fun and worry are more harmonious and close. Even in the families where relations between each other can be estimated as very high quality, certain lack of politeness and attention from both sides can be felt. This brings out a conclusion that even in very many good pairs the need of acceptance and intimacy from the close person is not satisfied.

### 2.3.3. Circumstances that bind couples together

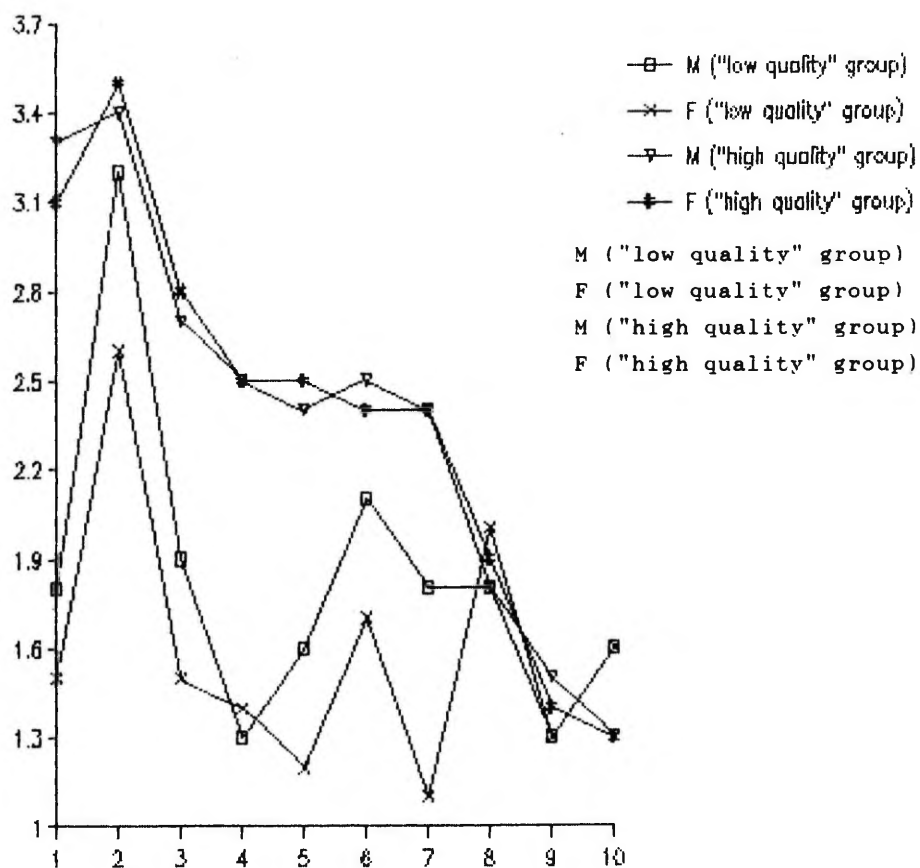
We set forth for couples a list made up of ten circumstances that connect married people. Estimation was carried out according to four-point-scale: 4-connecting very strongly; 3-connecting strongly; 2-connecting in a way; 1-not connecting at all.

Among circumstances binding together spouses the first place, both in the groups of low and high quality was taken by children (Table 6, Figure 2). Children as a connecting factor have got two aspects: in "good" pairs children bind spouses together and tighten their parents' closeness; in "bad" or risky pairs they tend to be the main obstacle that keeps away breaking up of a family. Particular data about young couples we have got gives evidence that children as a factor that prevents divorce more strongly influences men than women. It is quite legitimate: court practice shows that in most cases after the divorce the children stay with their mother. A woman much less afraid to be left without children after the divorce.



- 1 - Personality features of a spouse
- 2 - Spouse's tending and gentle attitude
- 3 - Spouse's attentive and polite attitude
- 4 - Spouse's respectful, understanding attitude
- 5 - Spouse accepts my habits
- 6 - Spouse accepts my hobbies
- 7 - Spouse accepts my profession
- 8 - Spouse empathizes my feelings of joy and worry

Figure 1. Spouse's attitudes towards the person answering in the pairs of low and high quality of relationships (average estimations)



- |                      |                                      |
|----------------------|--------------------------------------|
| 1 - Love             | 6 - Sexual compatibility             |
| 2 - Attachment       | 7 - Common home and management       |
| 3 - Common interests | 8 - Habit, usage                     |
| 4 - Children         | 9 - Fright of loneliness             |
| 5 - Feeling of dept  | 10 - Conciliation with circumstances |

Figure 2. Circumstances that bind together couples (average estimations)

Table 6. Circumstances that bind spouses together (considering them of "very essential" or "essential" influence, %)

Circumstances	Spouses' relationships				
	%	Low quality		High quality	
		M	F	M	F
Mutual love		5.6	20.0	71.9	81.6
Children		78.9	60.0	85.1	88.5
Common home and management		27.8	20.0	62.0	57.8
Attachment		5.6	10.0	62.8	56.3
Common interests		23.6	5.0	48.7	56.3
Feeling of dept		38.9	30.0	51.2	48.2
Sexual compatibility		22.2	5.0	53.7	49.5
Habit, usage		22.2	40.0	21.5	26.4
Fright of loneliness		0.0	10.0	8.4	9.4
Conciliation with circumstances		16.7	25.0	5.9	9.3

Analogically acts the fact of existence of common home and management. Having home and domestic management connects "good" pairs, but for the risky pairs, for men especially, it acts as a serious obstacle on their way of breaking up family. It is quite understandable: divorced man usually loses not only his children but his home also.

On the second place among factors connecting spouses of risky couples, closely following the children, is the feeling of debt, but its influence on the intimacy of "good" pairs is considerably lower. "Good" pairs estimate very highly the presence of mutual love and attachment, at the same time in risky pairs to this factor a very modest place is given.

### 3. Conclusion

After examining people intending to marry and young couples we can point out two moments of their life. We saw that persons intending to marry were full of good hopes about their marriage, especially about their relations between each other.

Study of young couples after five years of marriage - the next moment of their life - shows, how their expectations have realized to the moment of repeated questioning.

People intending to marry could be observed as one whole contingent. The same people after five years of marriage divided into three groups - with high, average and low quality of spousal relationships. These with "average" quality of relations are in some sense unprognosticable, they can easily pass over both to the first and the second group. In our analyses here they were omitted.

This comparative analysis showed that people from the group whose relations were estimated as those of low quality liked to connect positive features with their own personality, faults were at the same time ascribed to their partner. Stability of their marriages can mainly be explained with their common children, feelings of debt and the strength of usage.

Positive orientation of one of spouses towards the other, great harmony and intimacy in connection with relations of high quality between spouses is connected with the influence of bilateral empathy and attachment.

Children and common home bind "good" pairs together more closely, while for risky pairs they act as an obstacle and barrier against a family breakdown.

From this conclusion can be pointed out that in a work with couples in crisis it is very important to find out mutual bondages and resources of relationships that are hidden under the feelings of failure, distress and nonacceptance of the partner. This kind of work carries some kind of preventive character. Sometimes it is too late to understand mutual real connectedness when it all is already over.

#### References

1. Eesti NSV Rahvamajandus 1987 aastal. Tln: Valgus, 1989.
2. Heidmets, M. Linnakeskkond ja inimene. In: Elulaad ja elukeskkond. Tln.:Eesti Raamat, 1981, 42-63.
3. Kruusvall, J. Kodu linnas: keskkond elulaadi kujundajana. - In: Elulaad ja elukeskkond. Tln.:Eesti Raamat, 1981, 64-93.
4. Perlman, D., B. Fehr. The Development of intimate relationships. - In: Intimate Relationships. Development, Dynamics, and Deterioration. /Ed. by D. Perlman, S. Duck. Lnd.: Sage Publ. 1987, 13-42.

**STUDY II:  
PSYCHOLOGICAL COPING AND  
ADAPTATION WITH TRANSFORMATION**

Papers:

- IV. Kutsar D. (1994) Social change and stress in Estonia. Submitted for publication in the *Scandinavian Journal of Social Welfare*.
- V. Kutsar D. (1994) Sotsiaalsest stressist ja psühholoogilisest toimetulekust Eestis [On social stress and psychological coping in Estonia]. *Akadeemia* 1994, No.12: 2541-2566 (in Estonian).

Submitted for publication in the *Scandinavian Journal of Social Welfare*

SOCIAL CHANGE AND STRESS IN ESTONIA

DAGMAR KUTSAR

Research Psychologist

Unit of Family Studies

Tartu University

78 Tiigi St., EE 2400 Tartu, Estonia

tel: (37234)-30809; fax: (37234)-35440

IV

## **SOCIAL CHANGE AND STRESS IN ESTONIA**

### **Abstract**

Key words: multiple social change, social stress, coping and appraisal, subjective well-being, Estonia.

The article attempts to assess social stress in Estonia at this time of transformation. The hypothesized model of social stress is based on the stress and coping model of Lazarus and Folkman (1984) and Borden (1991) and is applied as a frame of reference to the investigation. One thousand adult respondents from the "Household Budget Survey" were involved in the survey in March/April 1993. The factor analysis revealed four factors which determined coping with stress: Frustration, Passivity, Happiness and Future Orientation. Cluster analysis of the respondents confirmed that 41% of the men's and 30% of the women's samples represented groups of risk of higher levels of distress. The findings provide support for the hypothesized model of social stress and indicate that multiple social change in Estonia is central source of stress for people living here.

The collapse of the Soviet order brought to an end not only a particular type of a political and economic system, but also a particular type of welfare state. New social phenomena such as unemployment, inequality and poverty have found a fertile soil in the former Soviet republics and in the other socialist countries of Central and Eastern Europe.

The transformation and its consequences in Central and Eastern Europe have great importance for those involved as well as for the developed western countries. Different aspects of reformation are discussed at numerous political meetings and presented at scientific conferences. Several articles have been published on this issue by eastern and western scholars (Deacon 1992; Marklund 1993; Dellenbrant 1993; Ferge & Kolberg 1992; Kultygin 1993; Kutsar & Trumm 1993; Marody 1992; Warzywoda-Kruszynska & Grotowska-Leder 1993). The barriers to transformation have usually been the focus and scenarios outlined have mainly been negative in tone (Dellenbrant 1993).

Estonia restored her independence after fifty years of Soviet occupation in 1991. People in Estonia are exposed to a dual process of transformation of their society, namely a transition from a totalitarian to a democratic society, and from a planned to a market economy. The multiple impact of this process of transformation is made manifest in the pressures on the people to engage in political, social and economic re-construction, pressures which demand the ability to adapt to change and to re-construct personal identity. Changes on the societal level lead to the development of new patterns of interpersonal relationships: competition for the inadequate supply of jobs, the increasing role of monetary relations among people, an increasing need to be able to fight for one's way of life. New situations create new demands for everybody which require a readiness to further one's knowledge and skills; everyone is expected to have an enterprising spirit in a big way scale. Competing explanations of events in the mass media make the future less clear-cut and this, in turn, increases tension among people. Unrealistic social expectations create social myths, feelings of personal failure, distrust of the authorities. When the myths break down, the result is a loss of faith in the possibility of further national development.

New social problems have revealed inner weaknesses representing the legacy of socialism and the totalitarian system (Kutsar, Trumm 1993). A shortage of labour had made people unconcerned about the quality of work, since they never feared losing their jobs. Increasing unemployment has been real shock for those experiencing it. The philosophy of a planned economy and of paternalistic care by the state produced learned helplessness and the lack of a self-help mentality. Some people, after the losing their job or permanent income, unexpectedly find themselves among the group which, at least temporarily, needs social welfare services. The memories of the past create suspiciousness concerning the privatization and the decisions made by the government. The ruins of the poor institutional welfare system, the limited resources of the state and a lack of social guarantees combine to make people feel insecure.

The present study seeks to address issues such as how people in Estonia are reacting to this massive change and what they feel while coping with the new life situations. Who is at greatest risk of psychological survival, who can welcome the social changes as attractive challenge?

*The study has dual aims:*

- to assess the personal reactions and feelings of the respondents and to identify factors which determine the ability to cope with social stress in Estonia;

- to determine levels of psychological well-being and to identify the at-risk group of people with higher levels of distress.

A hypothesized model of adaptation to social stress, based on the stress and coping model of Lazarus and Folkman (1984) and Borden (1991), is applied as a frame of reference to the investigation.

### *Background of the study*

Many researchers believe that three types of stress can be differentiated: physiological, psychological and social. They are related, although the nature of the relationship is far from clear (Mason 1975). Particularly confusing is the lack of agreement between researchers concerning the definition of '*stress*'. Any situation may or may not be stressful, depending on the characteristics of the individual and the meaning of the situation (Monat & Lazarus 1985:2). Lazarus (1966) argues that '*stress*' is a collective term for an area of study rather than an exactly defined notion.

Everybody has to meet changes during their lives as they age they have to cope with several developmental crises (Erikson 1963). Marriage, the birth of a child, the death of a close relative, the loss of a job - every change, positive or negative, that demands adjustment can be considered to be stressful. To measure these life changes, Holmes and Rahe (1967) developed a self-administered questionnaire in which a person reports whether any of the indicated life changes have occurred during the past few months or years. Change in any society includes processes of innovation, adaptation and resistance. When the transitions are rapid, these processes overlap, and predicting the future is especially difficult (Settles 1987). Smelser (1960) has pointed out that '*social stress*' is related to the disruption of a social unit or a system. Not only disruption, but the construction of a new system involves many changes that cause tension and demand from an individual a mastery of cognitive re-structuring, coping with new developments and the adjustment to the new tasks. The phenomenon of *social stress* becomes observable at times when people feel their lives to be directly influenced by the events at the societal level. The process of transformation in a society creates an extra burden of tension which needs to be coped with and adapted to.

In everyday language we say: "The situation is under control". The expression means that we are able to understand the situation we are involved in. Many investigations of stress have confirmed that the cognitive (perceived) control over a situation has positive significance for anyone who is in this situation (Burke 1991; Rotter 1966; Rothbaum, Snyder & Weisz 1982; Thoits 1991). People who feel positively about the change are catalysts in their environment. People who cope well in a stressful situation are believed to possess three general characteristics:

- the belief that they can control or influence events in their lives;
- an ability to feel deeply involved in, or committed to, the activities of their lives;
- the anticipation of change as an exciting challenge for further development (Kobasa 1985:177-178).

People who feel powerless and who are poorly motivated to achieve have a high risk of personal failure in a stressful situation (Averill 1973). Multiple social change tests a person's coping resources which, in turn, are central to the psychological well-being of an individual.

## METHOD AND SAMPLE

### *Theoretical standpoint*

The present study proceeds from the hypothesized model of adaptation with social stress, based on the stress and coping model of Lazarus and Folkman (1984) and Borden (1991). The antecedent characteristics, mediating processes and adaptational outcome are shown in Figure 1.

Figure 1 about here

*Antecedent variables: gender, age, nationality.* The antecedent conditions used to induce stress (Monat & Lazarus 1985:3). The implicit assumption, consistent with biological stress models, is that the respondent's stress follows from the objective, external demands. The gender, age and nationality of a respondent serve as differentiating variables of cognitive appraisal and the ability to cope with social stress. It was expected that a respondent's demographic characteristics determine cognitive appraisal of social change and the state of psychological well-being.

*Mediating processes: appraisal and coping.* The social changes may be understood as stressors that are appraised in different ways. Differences in appraisal of change were expected to lead to varying degrees of stress. In accordance with the hypothesized model, appraisal and coping with the social change results in the perception of the situation as challenging or not so challenging for the actor's adaptational outcome. If an individual constructs a situation as challenging, the response is likely to be a sense of control over the stressful event. In contrast, if the situation is constructed as unfavourable, externally determined with no possibility of control on his/her part, what follows is a sense of little capacity to influence anything. Perceived control is believed to buffer potentially harmful effects of stressors and to strengthen coping resources (Rothbaum, Snyder & Weisz 1982).

Coping strategies have been conceptualized as *problem-focused* when the goal is to change stressor conditions and *emotion-focused* when the goal is to relieve the emotional impact of stress (Borden 1991; Lazarus & Folkman 1984, Monat & Lazarus 1985). In this study it was hypothesized that the respondents reporting higher levels of distress would more frequently exhibit coping strategies characterized by a negative focus and by wishful thinking. Such coping strategies leave personal goals blocked and there is little resilience to resist the distressing feelings. The respondents reporting lower levels of distress were expected to rely more frequently on coping strategies characterized by a positive focus and by problem solving. The assumption was that the respondents with lower levels of distress would face stressful events as if they were offering new perspectives and exciting challenges for their lives. This, in turn, would lead to higher levels of psychological well-being. On the contrary, the failure to respond to the demands of new social situations would reflect negatively on the person's psychological well-being.

*Adaptational outcome: psychological well-being.* The concept of psychological well-being can be seen as an indicator of adaptational outcome (Larson 1978). The research hypothesis held that the levels of psychological well-being would be determined in varying degrees by the perception and construction of multiple social change as challenging and by a future orientation. Reliance on emotion-focused and problem-focused strategies was expected to differentiate the levels of psychological well-being, on the assumption that well-being acknowledges the possibilities as well

as limitations for action in the context of social change.

### *Material*

An original self-administered questionnaire investigating social stress experienced by people living in Estonia was elaborated by the author applying some items from the interview project "Self-concept over the life-span" (Institute for Social Research, University of Michigan 1991). This was the first test of the questionnaire and there was no test-retest reliability control.

The questionnaire was constructed around four dimensions: activity - passivity; life orientation (*past, present, future*); locus of perceived control (*internal vs. external*); and the emotional state of a respondent (*depressed vs. stimulated*). The questionnaire consisted of two parts following the problem-focused and emotion-focused coping taxonomy of Folkman and Lazarus (1980). The first part was formed from 15 Likert-type statements that people sometimes make about themselves. Respondents were asked to indicate how much they agreed or disagreed with each item ("strongly agree", "somewhat agree", "somewhat disagree", "strongly disagree"). The second part of the questionnaire consisted of eleven Likert-type statements describing how people sometimes feel. Respondents were asked to say how often they had felt that way during the last two weeks ("most of the time", "some of the time", "hardly ever", "never"). The respondent's sex, age and nationality were included as the independent variables.

### *Sample*

The current investigation was included in the umbrella project "Estonian Household Budget Survey" which gathers state statistics; it is carried out every month by Estonian Market and Opinion Research Centre (EMOR Ltd.). From the whole sample of 2000 households a random sub-sample of 1000 adult household members was formed and they were involved in the self-administered questionnaire on social stress in March/April 1993. The final sample was 809 respondents (349 men and 460 women), the response rate being 81%

Table 1 about here

The mean age of the subjects was 43.7 years, ranging from 18 to 74 years (Table 1). The respondents were divided into four age groups: 18<30 as *young*; 31<45 as *early middle age*; 46<60 as *middle age*; 61< as *retirement age*. The respondents were divided into two nationality groups: *Estonians* (80.5%) and *non-Estonian* respondents (19.4%).

### *Data analysis*

The hypothesized model of social change and stress was tested using different methods of

quantitative analysis.

Differences between the test subjects of the determined groups of the respondents were controlled by *t-test* and *Kruskal-Wallis one-way analysis of variances*. Coping resources of the subjects were determined by *Factor analysis* of the test items. The internal consistency (*Cronbach's alpha*) of the items acquiring higher factor loadings in the factor analysis was processed. The level of psychological well-being of the respondents was determined by the *Cluster analysis* of the respondents. The homogeneity of the cluster group variances was verified by *Bartlett test*. Confidence of the statistical decisions was verified at the level of  $p < .05$ .

## RESULTS

*Gender.* Gender differences turned out to be statistically sufficient ( $p < .05$ ) in eleven of the 26 items (Table 2). As a whole, women's responses were characterized by higher emotionality; they reported higher fear about the future, they were more cautious in making decisions and plans, and they had little hope that they could change anything. Men expressed higher self-confidence and acknowledged arising new ideas more often in comparison with women.

*Nationality.* The responses revealed the different situations of Estonian and non-Estonian respondents (Table 2). At present the non-Estonian population experiences less involvement in the development of Estonian society; they perceive themselves as having less control over events and experience more insecurity in relation to their personal futures than the Estonian population. Many problems concerning the non-Estonian population are still not resolved, and the question of their integration into the Estonian society is still acute.

Differences between the responses are statistically significant on almost all the items. It can be concluded that nationality is a statistically significant independent variable which determines respondents' ability to cope with social stress and their state of psychological well-being.

Table 2 about here

*Age.* The classification of responses by age revealed statistically significant differences (Table 2). The respondents from younger age groups have a clearer future orientation than older respondents. Young people agree that their time will come, whilst the respondents of the older age groups revealed a more nostalgic attitude towards past achievements and hard work. Older people also feel that they have less control over the new circumstances and more often feel that they have "missed the boat", i.e. the changed situation is perceived as holding few opportunities.

A respondent's age represents statistically confirmed antecedent characteristic of psychological well-being. In the case of multiple societal change older people are at more risk of not coping well with the change.

### *Factors determining appraisal and coping with social stress*

A principal components factor analysis was performed with a varimax rotation in which four psychologically meaningful factors emerged, together accounting for 42% of the total variance (Table 3). The factors were labelled proceeding from the items which most heavily loaded on the designated factor.

Table 3 about here

The first factor labelled as '*Frustration*' refers to a person's dissatisfaction with his/her life situation and the experience of negative emotions during last two weeks, i.e. to *negative emotion-focused coping*. This factor clearly represents the cognitive appraisal and coping processes of the older groups of respondents. The internal consistency of the items most heavily loaded on the designated factor (*Cronbach's alpha*) is equal to 0.77 (items 7, 16, 17, 20, 21, 23, 25 and 26, see Table 2 and 3).

The second factor, labelled as '*Happiness*', refers to *positive emotion-focused coping* with social change (feeling happy, enjoying life, having fresh ideas and hopes about the future, but also accepting the postponement of decision-making because one's time has not yet come). This factor characterizes the cognitive appraisal and coping of the respondents in the younger age groups. The internal consistency of the items most heavily loaded on the designated factor (*Cronbach's alpha*) is equal to 0.82 (items 4, 10, 18, 19, 22 and 25, see Table 2 and 3).

The third factor, labelled as '*Passivity*', represents a sense of losing control over social change and feeling powerless to influence the events in one's life. Blocked aims and a lack of future orientation are reflected in *detachment and wishful thinking*. This factor characterizes the appraisal and coping processes of the respondents in the older age groups. The internal consistency of the items most heavily loaded on the designated factor (*Cronbach's alpha*) is equal to 0.66 (items 2, 3, 5, 8, 12, 13, and 14, see Table 2 and 3).

The fourth factor, labelled as '*Future orientation*', refers to successful cognitive restructuring of social change. This factor determines *positive problem-oriented coping* of a person. The factor is not associated with any particular age group. The internal consistency of the items most heavily loaded on the designated factor (*Cronbach's alpha*) is equal to 0.38 (items 1, 3, 6, 9, 11 and 15, see Table 2 and 3).

### *Estimation of psychological well-being of the respondents.*

The Cluster analysis was aimed at identifying different levels of psychological well-being amongst the respondents with a view to describing an adaptational outcome of social stress. The Cluster analysis, including all 26 items of the questionnaire, was processed separately for male and female respondents. The analysis revealed two clusters for men and three clusters for women (Table 4).

Only one item ("I think more about the future than of the present and the past") failed to differentiate between the clusters. On every other item the differences between the clusters were significant at the level of  $p < 0.001$ . The Bartlett test for homogeneity of group (cluster) variances showed high probability ( $p < 0.001$ ).

Age turned out to be sufficiently different ( $p < 0.001$ ) by all the clustered groups of the both sexes. The respondents of the second cluster of male and female respondents have the highest mean age (49.5 years for men and 50.9 years for women). *Non-Estonians* are more found in the second cluster of men and the second and third clusters of women; the respondents of Estonian nationality are represented more often in the first clusters of both sexes (Table 4).

Table 4 about here

The groups of respondents which have been identified by the cluster analysis, differ by the factors determining coping with social stress as well as by the levels of psychological well-being. Further, characterizing the different levels of psychological well-being of the groups of respondents, the variables which occurred to have a high correlation with the given factor in the factor analysis, are taken as the points of departure and the percentage of the respondents with strong agreement to this item are calculated (Figure 2-5 or Table 5).

*The first cluster of men and the first cluster of women* can be characterized as the groups with the highest subjective well-being in comparison with the other groups. They represent 58.4% of the males' and 39.7% from the females' sample. Having low level of frustration, they demonstrate a strong future orientation and active participation in the social changes in Estonia. They can enjoy life, experience an internal locus of control and see the situation as challenging - although one quarter of the respondents in the first clusters of both sexes have financial worries, reflecting the generally poor economic situation of the population (Figure 2-5 or Table 5).

*The second cluster of men and the second cluster of women* show low subjective well-being and can be identified as the groups experiencing higher levels of social distress. The clusters constitute 41.6% of the males' and 29.7% of the females' sample. The respondents going in the second clusters of the both sexes are highly frustrated, nostalgic and passive (Figure 2-5 or Table 5). Almost 3/4 of the respondents believe that their lives could be happier than they are now. Frustration is expressed by fatigue, living for today, a lack of future orientation and a lack of perceived control over the situation. They have no new ideas and hopes, cannot protect their personal interests and have a feeling that their time for action will never come. One of their major worries is financial. On average, they are older than the respondents of the other clusters and the social changes are perceived more often as a negative challenge. Their influence on events is connected with their past experience. They remember feeling socially involved in the time before the social transformation. The prospect of social change leaves them feeling passive and nostalgic. They think it wise not to plan much ahead and they more often see life a matter of chance and controlled by outside events. About 1/3 of male respondents of this group keep to an opinion that their time is over, they have "missed the boat". Notably, many respondents (37% male respondents and 35% female respondents of the respective clusters) associate their past with powerful people who influenced their lives.

(Table 5 or Figures 2-5 about here )

*The third cluster* consists only of female respondents, constituting 30.6% from the whole female sample. The cluster reflects the intermediate level of subjective well-being and is ambiguous in its orientation. On the one hand, they reveal high levels of frustration and passivity, whilst on the other, they enjoy life, have a future orientation and feel involved in the transformation process (Figures 2-5 or Table 5).

### *Conclusion*

Increasing levels of social stress tend to coincide with increasing opportunities and potential resources. New situations create new challenges and new hardships. Active, enterprising people who can deal with new opportunities of the Estonian economy and the whole development of the country, are facing up to the challenge. The groups experiencing social distress reveal frustration and a nostalgic orientation to the past: they express powerlessness demonstrated by an external locus of control and less involvement in a social change, e.g. alienation from society.

The cluster analysis reveals an at-risk group of people with higher levels of distress. They constitute 41% of the male and 30% of the female samples. They tend more often to be the respondents from the older age groups and of non-Estonian origin. The less distressed group constitutes 59% of the male sample and 30% of the female sample. More often, they are the respondents from the younger age groups and those of Estonian nationality.

### *Why do the respondents of older age groups experience higher levels of social distress?*

1. Investigations on socialization have confirmed that the lifelong socialization process is slowing down when a person gets older. This will make one's adaptation to the changes influencing his/her life subjectively more difficult, the exchange of old and dysfunctional coping strategies into new and functional ones gets more complicated.
2. Older persons meet difficulties in changing their habitual way of life and the whole life philosophy; younger persons only develop it.
3. It is more complicated for older people to change their habitual jobs, professions, to meet the new demands they are facing.
4. In the situation of the lack of work places younger people are preferred, it is troublesome for an older jobless person to find a new job.
5. Social myths of people of older age are more concrete because they proceed from their own experience in the past; on the other hand, breaking of a social myth is more painful for the older person because there is not so much time left for waiting for the improvement of the situation.
6. The whole development of Estonia favours young people.

### *Why do the respondents of non-Estonian origin experience higher levels of social distress?*

1. National awakening in 1987-88 and the restoration of the Estonian national state have left the non-Estonian population in the situation of psychological outsiders.
2. Not always the changes that have taken place in Estonia have been the choice of the non-Estonian population. It makes difficult to perceive the new situations as constructive

ones for them.

3. Some new social demands which need overwhelming cognitive reconstruction of meanings, understandings, beliefs, are specifically set to the non-Estonian population. For example, the people who have identified themselves as the majority group (Russians) and as the carriers of the official language, have obtained an extra burden of tensions to change their minds. Now they are the minority group of an independent state where the only official language is Estonian.

4. Unresolved problems create insecurity and uncertainty feelings about one's future.

5. Social myths support the role of an outsider enabling alienation processes from the society. Social myths decrease cognitive control over the new situations and increase the levels of social distress.

Distress and accompanying feelings of dissatisfaction, is a psychological state that cannot be endured by an individual in the long run because of the associated cognitive tensions (Festinger 1957; Olson & Schober 1993). The individual has two ways of reducing this tension: either to change the situation or to adapt his/her own personal standards and expectations of the undesirable/uncontrollable situation. The latter phenomenon is called 'resigned adaptation' by Ipsen (1987), Berger-Schmitt (1987) and Latten (1989).

People who adapt their personal expectations and standards to the undesired situation, cope with the situation and a state of mental stabilization is produced. Additionally, being satisfied with or resigned to the state of living leaves them with the incentive to take action. In the current research they were people who agreed with statements like "My time will not come", "I cannot protect my personal interests", "I hardly ever expect things to go my way and I am not the person to change anything", "I feel I've "missed the boat"". Frustration and passivity over a long period combined with resignation to the undesired situation lead to hidden depression. The number of people complaining of low spirits and seeking help from a psychologist or a psychiatrist is already increasing.

## References

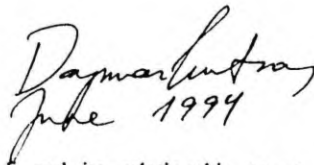
Averill, J.R. (1973). Personal control over aversive stimuli and its relationship to stress. *"Psychological Bulletin"* 80:286-303.

Berger-Schmitt R. (1978). Housing: Objective conditions and perceived quality of housing. *German Social Report (Part B, Subjective Well-being)*. W.Zapf, et al. *Social Indicators Research* 19:1-171.

Borden, W. (1991). Stress, coping, and adaptation in spouses of older adults with chronic dementia. *"Social Work Research & Abstracts"* 1:14-21.

Burke, B.J. (1991). Identity processes and social stress. *"American Sociological Review"* 6: 836-849.

Deacon B. (1992). East European welfare: past, present, future in comparative context. *The New Eastern Europe: Social policy past, present and future* /B.Deacon. SAGE Publications Ltd., 1-30.



Dagmar Lintsaas  
June 1994

- Dellenbrant J.A. (1993). Democracy and poverty. The implementation of social reforms in the countries of central and eastern Europe. *Scandinavian Journal of Social Welfare* 3: 150-157.
- Erikson, E.H. (1963). *Childhood and society*. 2nd ed. New York: WW Norton.
- Ferge Z., Kolberg J.-E. (1992). *Social policy in a changing Europe*. Boulder, CO, Campus/Westview.
- Festinger R. (1978). *Theorie der kognitiven Dissonanz (Theory of Cognitive Dissonance)*. Stuttgart: Huber.
- Folkman, S., Lazarus, R.S. (1980). An analysis of coping in a middle-aged community sample. *"Journal of Health and Social Behavior"*, 21:219-239.
- Holmes, T.H., Rahe, R.H. (1967). The social readjustment rating scale. *"Journal of Psychosomatic Research"* 11:213-218.
- Ipsen D. (1978). Das Konstrukt der Zufriedenheit (The concept of satisfaction). *Soziale Welt* 29:44-53.
- Kulygin V.P. (1993). Poverty and social trends in Russia. *Scandinavian Journal of Social Welfare*, 3:142-149.
- Latten J.J. (1989). Life-course and satisfaction equal for every- one. *Social Indicators Research* 21:599-610.
- Kobasa, S.C. (1985). Stressful life events, personality, and health: An inquiry into hardiness. *Stress and Coping. An Anthology*/Ed by A.Monat, R.S.Lazarus. New York: University Press, 174-188.
- Kutsar, D., Trumm, A. (1993). Poverty of households in Estonia. *"Scandinavian Journal of Social Welfare"* 3:128-141.
- Larson, R. (1978). Thirty years of research on the psychological well-being of older Americans. *"Gerontologist"* 23:109-125.
- Lazarus, R.S. (1966). *Psychological stress and the coping process*. New York: McGraw Hill.
- Lazarus, R.S., Folkman, S. (1984). *Stress, appraisal and coping*. New York: Springer.
- Life concept over the life-span. Pretest I. (1991). The University of Michigan, Survey Research center, Institute for Social Research.
- Marklund S. (1993). Social policy and poverty in post- totalitarian Europe. *Scandinavian Journal of Social Welfare*, 3:104-114.
- Marody M. (1992). Building a competitive society: Challenges for social policy. *A Background document for the International seminar "Towards a Competitive Society in Central and Eastern*

*Europe: Social Dimensions*", Kellokoski, Finland.

Mason, J.W. (1975). A historical view of the stress field. Part I. *"Journal of Human Stress"* 1:6-12.

Monat, A., Lazarus, R.S. (1985). Introduction: Stress and coping - some current controversies. *Stress and Coping. An Anthology.* Ed by A.Monat, R.S.Lazarus. New York: University Press, 1-2.

Olson G.I., Schober B.I. (1993). The satisfied poor. Development of an intervention-oriented theoretical framework to explain satisfaction with a life in poverty. *Social Indicators Research*, 28:173-193.

Rothbaum, T., Snyder, S.S., Weisz, J.R. (1982). Changing the world and changing the self: A two process model of perceived control. *"Journal of Personality and Social Psychology"* 42:5-37.

Rotter, J.B. (1966). Generalized expectancies for internal versus external control of reinforcement. *"Psychological Monographs"* 80:609.

Settles, B.H. (1987). A Perspective on tomorrow's families. *Handbook of Marriage and the Family*/Ed M.B.Sussmann, S.K. Steinmetz. New York: Plenum Press, 157-180.

Smelser, N.J. (1963). Theory of collective behavior. New York: Free Press of Glencoe.

Thoits, P.A. (1991). On merging identity theory and stress research. *"Social Psychology Quarterly"* 54:101-112.

Warzywoda-Kruszynska W., Grotowska-Leder J. (1993). Poverty and social conditions in Poland during the transformation to a market economy. *Scandinavian Journal of Social Welfare*, 3:115-127.

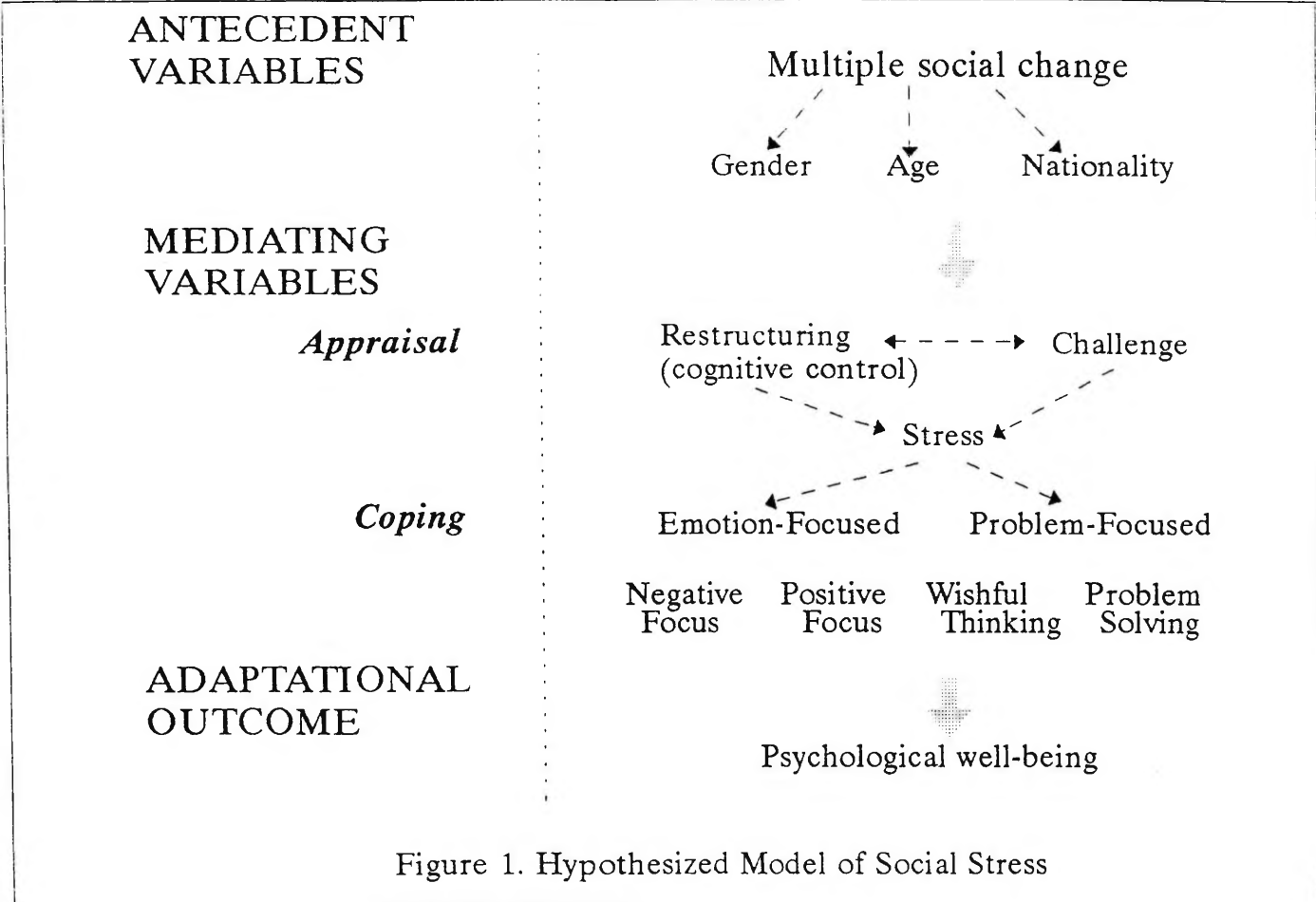


Figure 1. Hypothesized Model of Social Stress

Table 1. Demographic Characteristics of Sample (n=809)

Variable	Percent	N	Mean
<b>Sex</b>			
Male	43.1	349	
Female	56.9	460	
<b>Nationality</b>			
Estonian	80.5	652	
Non-Estonian	19.4	157	
<b>Age</b>			
Young (18<30 years)	23.8	193	43.7
Male	23.5	82	
Female	24.1	111	
Early middle age (31<45 years)	36.8	298	
Male	37.5	131	
Female	36.3	167	
Middle age (46<60 years)	22.5	182	
Male	22.1	77	
Female	22.8	105	
Retirement age (61< years)	16.8	136	
Male	16.9	59	
Female	16.7	77	

Table 2. Mean Ratings on Four-point Scale, Standard Deviations and Mean Differences by Sex and Nationality

Item	Males		Females		p< .05	Estonians		Non-Estonians		p< .05
	Mean	SD	Mean	SD		Mean	SD	Mean	SD	
1. I look at my future with hope	1.9	0.9	1.8	0.8		1.8	0.8	2.0	0.8	*
2. I never expect things to go my way and I'm not the person to change anything	2.1	1.0	1.9	0.9	*	2.1	1.0	1.7	0.8	*
3. I feel I'm "missed the boat"	2.7	1.0	2.7	1.0		2.8	1.0	2.5	1.1	*
4. I believe my time will come	2.3	1.0	2.4	1.0		2.4	1.0	2.2	1.1	*
5. I think more about my past accomplishments than about my future goals	2.4	1.0	2.5	1.0		2.6	1.0	2.0	0.9	*
6. I think more about the future than of the present and the past	1.8	0.9	1.9	0.9		1.9	0.9	1.7	0.9	*
7. My life could be happier than it is now	1.7	0.8	1.6	0.8		1.7	0.8	1.5	0.7	*
8. I think it wise to live for today's day because life is controlled by outside events	2.4	1.1	2.2	1.0	*	2.3	1.0	1.9	1.0	*
9. When I make plans, I am almost certain to make them work	1.7	0.7	1.6	0.7		1.6	0.7	1.9	0.8	*
10. I am a lucky person	2.4	0.8	2.3	0.8		2.3	0.8	2.3	1.0	
11. I am able to protect my personal interests	2.0	0.9	2.2	0.9	*	2.1	0.9	2.2	1.1	
12. My life has been determined by powerful persons	2.7	1.1	2.9	1.1	*	2.8	1.1	2.4	1.2	*
13. Now it's not wise to plan much ahead, many things are dependent on chance	1.9	0.9	1.7	0.9	*	1.8	0.9	1.7	0.9	*
14. All I ever achieved is because I work hard for it	1.6	0.7	1.5	0.7		1.5	0.7	1.4	0.7	*
15. I am not concerned about what happens in Estonia	3.2	1.0	3.2	1.0		3.5	0.8	2.1	1.1	*
16. In the last two weeks I have felt fatigue	2.3	0.8	2.2	0.8	*	2.3	0.8	2.1	0.9	*
17. In the last two weeks I have felt sad	3.0	0.8	2.7	0.9	*	2.9	0.8	2.5	1.0	*
18. In the last two weeks I felt new hope	2.6	0.8	2.7	0.8		2.6	0.8	2.8	0.9	
19. I have had new ideas in the last two weeks	2.5	0.8	2.7	0.8	*	2.6	0.8	2.8	1.0	*

Table 2 (continued)

Item	Males		Females		p< .05	Estonians		Non- Estonians		p< .05
	Mean	SD	Mean	SD		Mean	SD	Mean	SD	
20. In last two weeks I have felt frightened about the future	2.9	1.0	2.7	1.0	*	2.9	0.9	2.2	1.0	*
21. In last two weeks I have been concerned about the money matters	1.9	0.9	1.9	0.9		1.9	0.9	1.7	0.9	*
22. In last two weeks I have felt happy	2.8	0.8	2.8	0.8		2.8	0.7	2.9	0.9	
23. In last two weeks I have felt lonely	3.3	0.8	3.2	0.9	*	3.2	0.8	3.0	1.0	*
24. In the last two weeks I have experienced obligingness of other people	2.5	0.7	2.3	0.7	*	2.4	0.7	2.3	0.8	*
25. In the last two weeks I have enjoyed life	2.7	0.7	2.8	0.8		2.7	0.7	3.0	0.7	*
26. In the last two weeks I have felt hopeless	3.2	0.9	3.1	0.9		3.3	0.8	2.7	1.1	*

Table 2a. Mean Ratings on Four-point Scale, Standard Deviations and Mean Differences by Age Groups

Item	18<30 years		31<45 years		46<60 years		61< years		p< .05
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	
1. I look at my future with hope	1.6	0.7	1.8	0.8	1.9	0.8	2.1	1.0	*
2. I never expect things to go my way and I'm not the person to change anything	2.3	1.0	2.2	1.0	1.8	0.9	1.4	0.7	*
3. I feel I'm "missed the boat"	3.0	0.9	2.9	0.9	2.5	1.0	2.1	1.0	*
4. I believe my time will come	1.6	0.6	2.2	0.9	2.8	1.0	3.3	0.9	*
5. I think more about my past accomplishments than about my future goals	2.6	0.9	2.6	1.0	2.3	1.0	2.0	0.9	*
6. I think more about the future than of the present and the past	1.7	0.8	1.7	0.8	1.9	1.0	2.1	1.1	*
7. My life could be happier than it is now	1.7	0.8	1.7	0.8	1.6	0.8	1.6	0.7	*
8. I think it wise to live for today's day because life is controlled by outside events	2.3	1.0	2.4	1.0	2.2	1.1	1.9	1.1	
9. When I make plans, I am almost certain to make them work	1.7	0.7	1.6	0.6	1.6	0.7	1.7	0.9	*
10. I am a lucky person	2.2	0.7	2.3	0.8	2.5	0.9	2.6	1.0	
11. I am able to protect my personal interests	2.0	0.8	2.0	0.8	2.1	0.9	2.5	1.0	*
12. My life has been determined by powerful persons	3.0	1.0	2.9	1.0	2.7	1.2	2.3	1.2	*
13. Now it's not wise to plan much ahead, many things are dependent on chance	2.0	0.9	1.8	0.9	1.7	0.9	1.5	0.9	*
14. All I ever achieved is because I work hard for it	1.9	0.8	1.5	0.7	1.4	0.6	1.2	0.4	*
15. I am not concerned about what happens in Estonia	3.1	1.0	3.2	1.0	3.5	0.9	3.1	1.1	*
16. In the last two weeks I have felt fatigue	0.7	2.2	0.8	2.2	0.9	2.0	0.8		*
17. In the last two weeks I have felt sad	2.9	0.7	2.9	0.8	2.8	0.9	2.7	1.0	*
18. In the last two weeks I felt new hope	2.4	0.8	2.7	0.7	2.7	0.8	3.0	0.8	
19. I have had new ideas in the last two weeks	2.4	0.8	2.6	0.8	2.7	0.8	3.0	0.9	*

Item	18<30 years		31<45 years		46<60 years		61< years		p< .05
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	
20. In last two weeks I have felt frightened about the future	3.0	0.9	2.8	1.0	2.7	1.1	2.5	1.1	*
21. In last two weeks I have been concerned about the money matters	1.9	0.8	2.0	0.9	1.9	0.9	1.8	0.9	*
22. In last two weeks I have felt happy	2.5	0.7	2.7	0.7	2.9	0.7	3.2	0.8	
23. In last two weeks I have felt lonely	3.2	0.8	3.3	0.8	3.2	0.9	3.1	1.0	*
24. In the last two weeks I have experienced obligingness of other people	2.4	0.7	2.4	0.7	2.4	0.8	2.2	0.8	
25. In the last two weeks I have enjoyed life	2.6	0.7	2.7	0.7	2.8	0.7	3.0	0.7	*
26. In the last two weeks I have felt hopeless	3.3	0.8	3.2	0.9	3.1	0.9	2.9	1.1	*

Statements	Factor loadings							
	Men				Women			
	Frustration	Passivity	Happiness	Future orient.	Frustration	Passivity	Happiness	Future orient.
1. I look at my future with hope	-.193	.362	-.132	.471	-.242	.361	-.205	.392
2. I never expect things to go my way and I'm not the person to change anything	.197	-.055	.626	-.219	.146	-.312	.596	-.034
3. I feel I've "missed the boat"	.185	-.267	.474	-.357	.270	-.213	.435	-.338
4. I believe my time will come	.223	.547	-.324	.311	-.033	.761	-.186	.124
5. I think more about my past accomplishments than about my future goals	.278	-.014	.491	-.118	.102	-.023	.631	-.015
6. I think more about the future than of the present and the past	.206	.124	-.034	.640	.204	.421	.148	.385
7. My life could be happier than it is now	.491	-.092	.307	.230	.434	.032	.284	.257
8. I think it wise to live for today's day because life is controlled by outside events	.358	.114	.510	-.273	.030	-.098	.499	.014
9. When I make plans, I am almost certain to make them work	-.079	.171	.124	.581	-.160	.038	-.042	.735
10. I am a lucky person	-.318	.636	-.091	.019	-.614	.388	.099	.103
11. I am able to protect my personal interests	.282	.455	-.091	.405	-.301	.311	-.217	.406
12. My life has been determined by powerful persons	.189	-.150	.339	.049	.104	.013	.525	-.040
13. Now it's not wise to plan much ahead, many things are dependent on chance	.016	-.070	.624	.063	.072	-.128	.455	.150
14. All I ever achieved is because I worked hard for it	.064	-.031	.595	.353	.102	-.344	.340	.424
15. I am not concerned about what happens in Estonia	.370	.240	.116	-.477	.293	.209	.432	-.325
16. In the last two weeks I have felt fatigue	.472	-.270	.097	.061	.404	-.198	.189	-.087
17. In the last two weeks I have felt sad	.664	-.191	.041	-.077	.716	-.048	.153	-.085
18. In the last two weeks I have felt new hope	-.031	.571	-.067	.332	-.352	.565	.001	.087
19. I have had new ideas in the last two weeks	-.104	.558	-.077	.246	-.365	.557	-.043	.141
20. In the last two weeks I have felt frightened about the future	.721	-.126	.229	-.168	.610	-.054	.390	-.032
21. In the last two weeks I have been concerned about the money matters	.566	-.060	.180	.054	.497	.093	.302	.087
22. In the last two weeks I have felt happy	-.172	.702	-.138	-.075	-.562	.488	-.066	-.113
23. In the last two weeks I have felt lonely	.509	-.172	-.126	-.056	.512	-.000	.090	-.117
24. In the last two weeks I have experienced obligingness of other people	-.142	.321	.162	.048	-.469	.080	.174	.145
25. In the last two weeks I have enjoyed life	-.300	.566	-.026	.024	-.596	.433	-.058	-.019
26. In the last two weeks I have felt hopeless	.683	-.127	.159	-.209	.648	-.069	.372	-.086
27. Age of the respondent	.200	.461	-.546	.008	.109	.680	-.394	-.061
Percent of total variance explained	12.3	11.6	10.1	8.0	14.8	10.9	10.2	6.5

Table 3. Rotated factor loadings of the statements by four factors

Table 4. Distribution of Respondents by Age and Nationality in the Clusters of Men and Women

	Males			Females			
	Cl1	Cl2	Total	Cl1	Cl2	Cl3	Total
Resp in the cl (N)	199	142	341	180	135	139	454
(%)	58.4	41.6	100	39.7	29.7	30.6	100
<b>Age</b>							
18<30 yrs(%)	71.9	28.1	100	56.4	18.6	25.0	100
31<45 yrs(%)	61.4	38.6	100	47.9	19.8	32.3	100
46<60 yrs(%)	48.0	52.0	100	28.9	39.4	31.7	100
61< yrs(%)	37.3	62.7	100	12.0	56.0	32.0	100
18<30 yrs(%)	31.2	12.0	23.5	33.9	14.1	19.4	24.1
31<45 yrs(%)	39.2	33.8	37.5	44.4	24.4	38.9	36.3
46<60 yrs(%)	18.6	28.2	22.1	16.7	30.4	23.7	22.8
61< yrs(%)	11.1	26.1	16.9	5.0	31.1	18.0	16.7
<b>Total</b>	100	100	100	100	100	100	100
Mean (years)	40.3	49.5	44.9	37.2	50.9	45.2	44.4
SD	15.2	14.7		12.9	16.2	15.1	
<b>Nationality</b>							
Estonians (N)	178	100	278	165	103	98	366
(%)	64.0	36.0	100	45.1	28.1	26.8	100
Non-Estonians (N)	21	42	63	15	32	41	88
(%)	33.3	66.7	100	17.0	36.4	45.6	100

Table 5. Distribution of "strong agreement" answers of the items most heavily loaded on the designated factor by clusters (%)

Item	Percentage of "strong agreement" answers				
	Males		Females		
	CL1	CL2	CL1	CL2	CL3
<b>Frustration:</b>					
My life could be happier than it is now	5.7	70.4	23.3	70.4	72.7
I have been concerned about money matters	23.6	57.8	24.3	51.1	51.8
I have felt fatigue	9.1	30.3	6.7	35.6	18.0
I have felt frightened about the future	1.5	23.9	1.7	32.6	13.0
I couldn't enjoy life	5.0	19.7	2.8	35.6	10.1
I have felt hopeless	1.0	12.7	0.0	20.7	2.2
I have felt sad	0.0	9.9	1.1	23.0	5.0
I have felt lonely	1.0	6.3	1.1	13.3	1.4
<b>Passivity:</b>					
All I ever achieved is because I worked hard for it	44.2	72.5	45.6	73.3	69.1
Now it's not wise to plan much ahead, many things are dependent on chance	31.7	64.8	26.1	66.7	67.6
I never expect things to go my way and I'm not the person to change anything	15.6	61.3	12.8	65.9	55.4
I think it wise to live for today's day because life is controlled by outside events	12.6	53.5	16.1	42.2	39.6
My life has been determined by powerful persons	9.1	37.3	2.8	25.2	35.3
I think more about my past accomplishments than my future goals	10.6	35.2	2.2	26.7	32.4
I feel I've "missed the boat"	3.0	31.7	2.8	34.8	10.1
<b>Happiness:</b>					
I believe my time will come	30.1	18.3	25.0	7.4	28.8
I'm a lucky person	13.6	7.0	20.0	0.7	15.1
I have had new ideas in the last two weeks	13.6	9.2	7.8	0.7	10.8
I have felt new hope	9.6	8.5	10.0	0.7	8.6
I have enjoyed life	9.6	1.4	7.8	0.0	4.3
I have felt happy	7.0	3.5	7.2	0.0	2.9
<b>Future orientation:</b>					
I'm concerned about what happens in Estonia	62.3	43.0	70.6	45.9	47.5
When I make plans, I'm almost certain to make them work	51.8	40.1	53.9	35.6	54.7
I look at my future with hope	49.8	12.7	52.7	14.1	41.7
I think more about the future than of the present and the past	42.7	50.0	35.0	37.0	60.4
I didn't feel I'd "missed the boat"	33.2	10.2	42.8	5.9	18.7
I am able to protect my personal interests	9.1	37.3	2.8	25.2	35.3

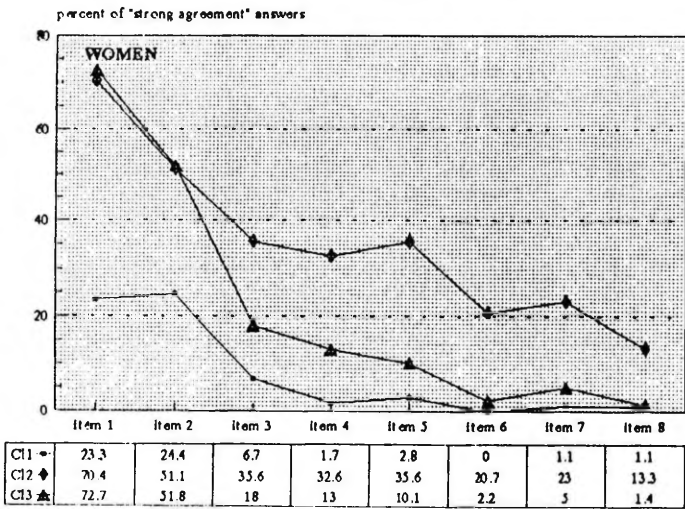
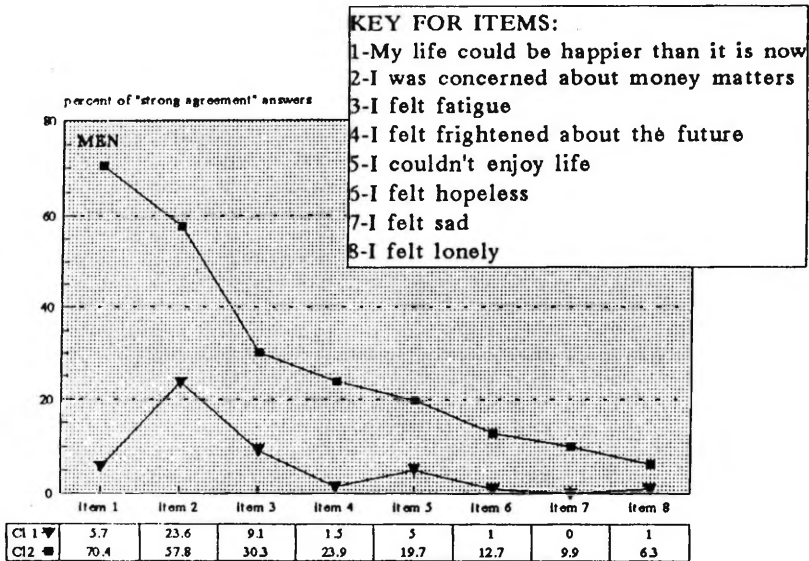
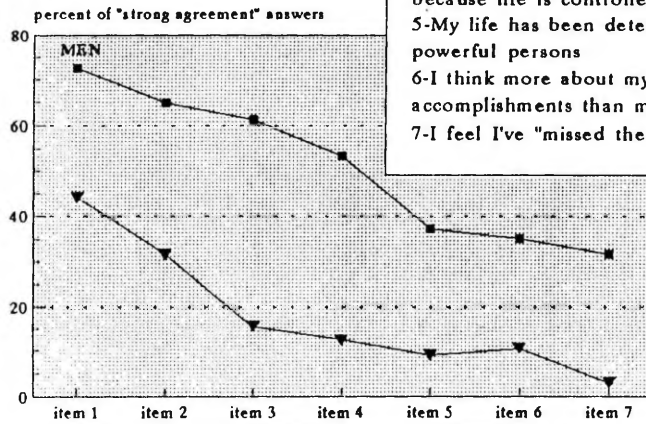


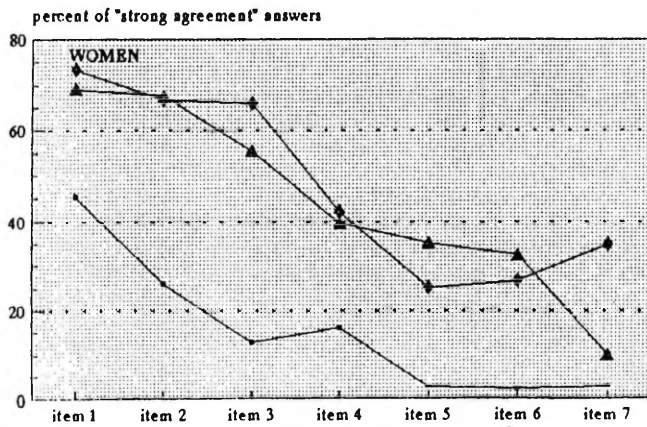
Figure 2. Distribution of strong agreement answers reflecting 'FRUSTRATION' of respondents by clusters (%).

**KEY FOR ITEMS:**

- 1-All I ever achieved is because I work hard for it
- 2-At present it's not wise to plan much ahead, many things are dependent on fortune
- 3-I hardly ever expect things to go my way and I'm not the person to change anything
- 4-I think it's wise to live for today because life is controlled by chance
- 5-My life has been determined by powerful persons
- 6-I think more about my past accomplishments than my future goals
- 7-I feel I've "missed the boat"



CI1 ▼	44.2	31.7	15.6	12.6	9.1	10.6	3
CI2 ■	72.5	64.8	61.3	53.5	37.3	35.2	31.7



CI1 ◻	45.6	26.1	12.8	16.1	2.8	2.2	2.8
CI2 ◆	73.3	66.7	65.9	42.2	25.2	26.7	34.8
CI3 ▲	69.1	67.6	55.4	39.6	35.2	32.4	10.1

Figure 3. Distribution of strong agreement answers reflecting 'PASSIVITY' of respondents by clusters (%)

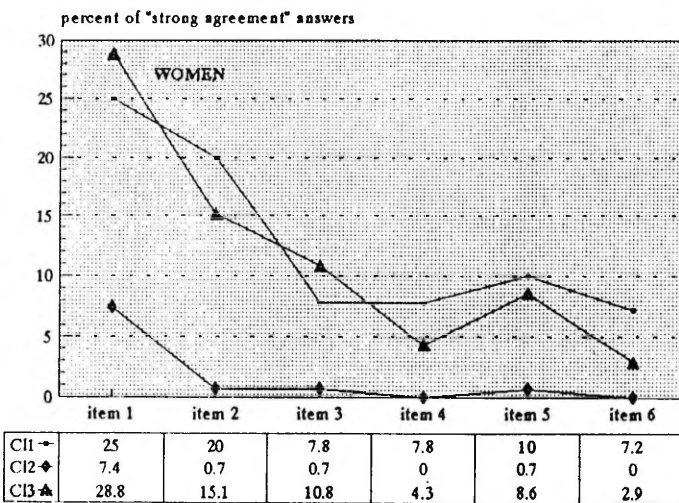
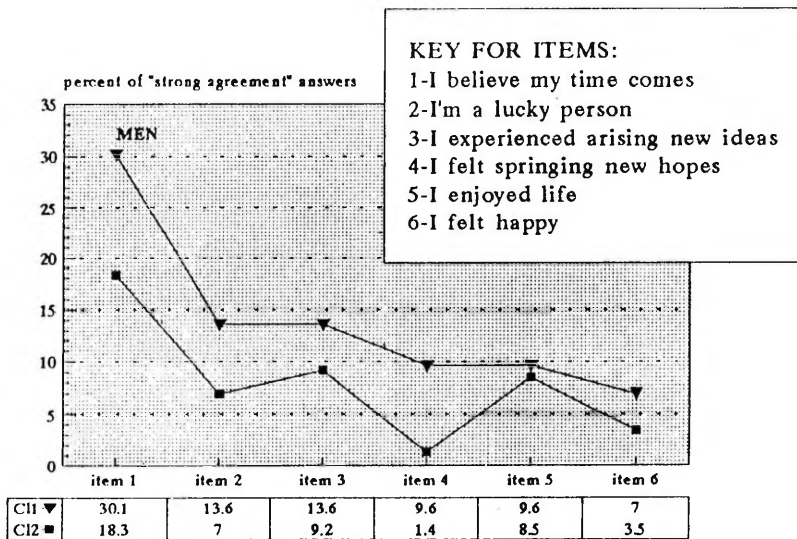
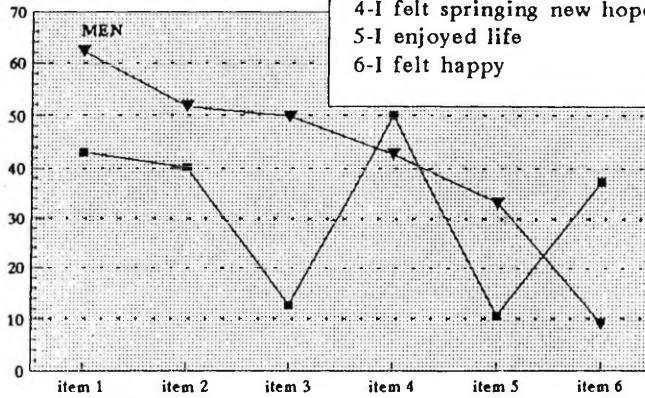


Figure 4. Distribution of strong agreement answers reflecting 'HAPPINESS' of respondents by clusters (%)

**KEY FOR ITEMS:**

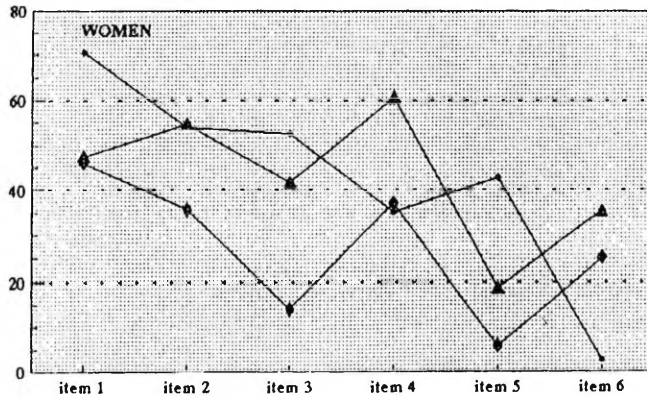
- 1-I'm concerned about what happens in Estonia
- 2-When I make plans, I'm almost certain to make them work
- 3-I look at future with hopes
- 4-I felt springing new hopes
- 5-I enjoyed life
- 6-I felt happy

percent of "strong agreement" answers



C11 ▼	62.3	51.8	49.8	42.7	33.2	9.1
C12 ■	43	40.1	12.7	50	10.6	37.3

percent of "strong agreement" answers



C11 →	70.6	53.9	52.7	35	42.8	2.8
C12 ◆	45.9	35.6	14.1	37	5.9	25.2
C13 ★	47.5	54.7	41.7	60.7	18.7	35.3

Figure 5. Distribution of strong agreement answers reflecting 'FUTURE ORIENTATION' of respondents by clusters (%).

---

# SOTSIAALSEST STRESSIST JA PSÜHHOOLIGILISEST TOIMETULEKUST EESTIS

*Dagmar Kutsar*

Nõukogude Liidu kokkuvarisemine, mis lõpetas kommunistide majandusliku ja poliitilise süsteemi eksistentsi, tõi endaga kaasa ka selle isevärki heaoluriigi purunemise. Endistes N. Liidu osades, samuti Ida- ja Kesk-Euroopa endistes satelliitriikides on laienemas inimestevaheline ebavõrdsus, töötus, vaesus ja teised elanikkonna jaoks täiesti uued sotsiaalsed probleemid.

Ida- ja Kesk-Euroopa riikide transformatsiooniprotsess, võimalikud arenguteed ja sellega kaasnevad ohud teiste maade jaoks on saanud sagedasteks teemadeks rahvusvahelistel teadlaste foorumitel, nendel teemadel on kirjutatud teaduslikke artikleid ja raamatuid (Deacon 1992; Dellenbrant 1993; Ferge, Kolberg 1992; Kultõgin 1993; Kutsar, Trumm 1993; Marklund 1993; Marody 1992; Warzywoda-Kruszynska, Grotowska-Leder 1993). Transformatsioonibarjääre on käsitlenud Dellenbrant (1993) oma artiklis, kus ta esitab ka negatiivse arengustsenaariumi.

Iseseisvuse taastamine Eestis 1992. aastal peale viiekümneaastast okupatsiooni on seadnud Eesti elanikkonna vastamisi kogu ühiskonna transformatsiooniprotsessiga — liikumisega totalitaarsest ühiskonnast demokraatlikku, plaanipärasest majanduse regulatsioonist turumajanduslikku. Mis pingestab sellisel ajal inimeste elu?

**1. Kiired muutused maa poliitilises, majanduslikus ja sotsiaalses elus.** Indiviidi tasandil nõuab see uute olukordade selget mõistmist, muutustega kohanemist, enese reidentifikatsiooni ja oma koha leidmist uutes tingimustes. Sündmuste pluralistlikud



seletused ja tõlgendused massimeedia kaudu raskendavad oluliselt muutuste mõistmist.

**2. Suurenevad inimestele esitatavad nõudmised.** Majanduse ümberstruktureerimine toob esiplaanile vajaduse ümberõppeks, luues eeliseid nendele inimestele, kes on selleks valmis; eelisasendis on ka need, kes on ettevõtlikumad, oskavad võõraid keeli, kellel on käepärane arvuti kasutamine jne.

**3. Muutuvad inimestevahelised suhted.** Töökohtade vähesus tekitab konkurentsi töökohtade pärast, raha hakkab inimsuhetes suuremat rolli mängima, suureneb sotsiaalne ebavõrdsus, mis omakorda pingestab elu.

**4. Irratsionaalsed sotsiaalsed ootused.** Sotsiaalsed ootused aitavad inimestel toime tulla ühiskonnas toimuvate muutustega ja oma jõudusid ajastada. Valeks osutunud sotsiaalsed ootused tekitavad aga lisapingeid, ebakindlust ja määramatust. Valed ehk irratsionaalsed sotsiaalsed ootused võtavad sageli sotsiaalse müüdi kuju, sekkudes inimeste käitumisse ja suhetesse. Sotsiaalsed müüdid esinevad kujul "kui... siis". Näiteks: "kui Eesti saab vabaks, siis jätkub eelmise iseseisvusaja hea elu..."; "kui tuleb oma raha, siis tuleb jõukus majja..."; "kui tuleb tööpuudus, jäävad laisad ja lohakad tööta..." jne. Eesti sai iseseisvaks riigiks ja inimesed seisid vastamisi uute raskustega; tuli oma raha ja ometi küllust mitte; tööpuudus ei puuduta mitte ainult laisku ja lohakaid, vaid ka korralikke ja kohusetundlikke töötajaid. Suhteline avatus Läände loob uusi ettekujutusi normaalsest elust, kuid ka kannatamatust seda ära oodata.

**5. Vana elufilosoofia ja nn sotsialismi pärand.** Uued sotsiaalsed probleemid on inimeste teadvuses ilmsiks toonud totalitaarsüsteemi pärandi, mis raskendab toimetulekut uutes tingimustes. Sotsialismiaegne tööjõupuudus muutis inimesed muretuks oma töökoha ja töökvaliteedi pärast. Plaanimajanduslik elufilosoofia ja riigipoolne paternalistlik hoolitsus on tekitanud suurel hulgal õpitud abitust ja eneseabimentaliteedi puudumist. Viiekümneaastane sotsiaalne kogemus pingestab suhtumist privatisseerimisse ja tekitab endiselt kahtlustavat suhtumist valitsuse tegevusse. Vana institutsionaalse sotsiaalse kaitse süsteemi kokkuvarisemine ja ressursside vähesus uue sotsiaalse kaitse süsteemi väljaarendamiseks jätab inimesed turvatundeta.

Transformatsiooniprotsess Eestis koos kohanemist nõudvate suurearvuliste muutustega meenutab Alvin Toffleri (1970) kirjeldatud tulevikušokki, millesse inimesed Eestis on viimase viiekuue aasta jooksul sattunud.

Käesolev uurimus seab endale järgmised ülesanded:

- 1) uurida Eestis elavate inimeste reaktsioone ja tundeid sotsiaalse transformatsiooni ajal ja määratleda need faktorid, mis determineerivad psühholoogilise toimetuleku selle tingimustes;
- 2) määratleda erinevad psühholoogilise heaolu tasemed sotsiaalse stressi suuruse järgi ja uurida suuremas sotsiaalses distressis olevat gruppi;
- 3) võrrelda Eestis elavate eestlaste ja mitte-eestlaste psühholoogilise heaolu taset.

#### *Uurimuse taust*

Ungari päritolu ameerika psühhoterapeut Hans Selye võttis 1956. aastal kasutusele "stressi" termini, tähistades sellega inimeste igapäevast pinget ja kulumist. Diskussioon stressi tüüpide eristamise ümber kestab mitu aastakümnet. Eri autorid eristavad kolme tüüpi stressi: **süsteemne** ehk **füsioloogiline** (Lazarus 1966 Selye järgi); **psühholoogiline** (Lazarus 1966) ja **sotsiaalne** (Smelser 1963). Stressi tüübid on omavahel tihedasti seotud, seda seost aga on vähe uuritud ja sellepärast on siin palju ebaselget. Nii näiteks füsioloogilisele stressile sarnaneva füsioloogilise reaktsiooni tekitab raskuste tõstmine, suurendades südame löögisagedust ja tõstes vererõhku. Samuti võivad stressi psühholoogilised tähendused olla erinevad. Situatsioon ise võib tekitada stressi või mitte, olenevalt indiviidi omadustest ja situatsiooni tähendusest temale. Lazarus (1966) soovitas rääkida "stressist üldse" kui uurimisalast.

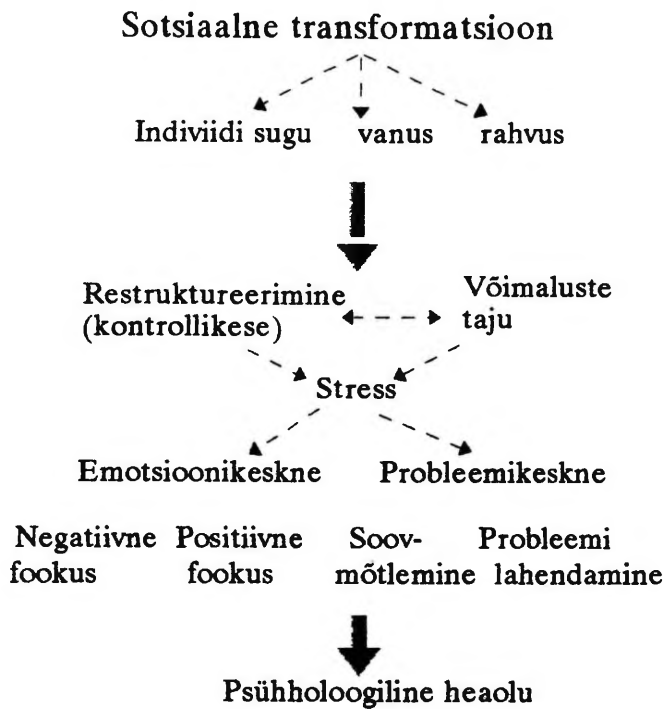
Stressiseisundi sisu sõltub teda vallandava teguri (stressori) iseloomust ja selle väärtusest indiviidi elulistele vajadustele. Indiviidile soodsad, tema elutegevust ja arengut toetavad nähtused vallandavad **eustressi**, mis omakorda viitab organismi heale kohastumisele keskkonnas. Eustressiga kaasnevad positiivsed emotsioonid: rahuldus, heameel, rõõm, vaimustus, õnnetunne. Sellest sugeneb teotahte tõus ning aktiivne ja konstruktiivne tegutsemine.

Tegurid, mis indiviidi vajadustele ei vasta või on ebasoodsad, kutsuvad esile **distressi**, mille olemuseks on puudulik või väär kohanemine keskkonnas. Distressiga kaasnevad negatiivsed emotsioonid: rahulolematuse, nõrdimuse, pahameele, ärevuse, mure, hirm, viha jne. Sellest sügeneb ka teotahte pärssumine või destruktivne käitumine. Samas võib distressil olla ka oma positiivne külg, mis avaldub inimese käitumist stimuleerivas efektiivsuses, ajendades midagi ette võtma distressi vallandava asjaolu kõrvaldamiseks ja distressi leevendamiseks. Nälg ajendab süüa otsima, külm soojemalt riietuma, süütunne eksimust korvama jne.

Smelser (1963) seostab "sotsiaalset stressi" sotsiaalsete üksuste või süsteemide lagunemisega või muutumisega. Mitte ainult lagunemine, vaid ka uue süsteemi ülesehitamine kätkeb endas pingeid tekitavaid muutusi, mis vajavad situatsiooni hindamise oskust, toimetulekut ja kohanemist uute eluülesannetega. Sotsiaalne stress muutub nähtavaks aegadel, mil inimesed tunnetavad, et nende igapäevast elu mõjutavad otseselt ühiskonnas toimuvad muutused. Ühiskonnas toimuv transformatsiooniprotsess tekitab toimetulekut nõudvat lisapinget igas inimeses.

Laialt tuntud on ütlus "Olukord on kontrolli all." See väljend tähendab, et nõnda väitev inimene mõistab toimuvat ja suudab seda juhtida. Kognitiivse kontrolli osa toimetulekuprotsessis on käsitletud paljud uurijad (Burke 1991; Rotter 1966; Rothbaum, Snyder, Weisz 1982; Thoits 1991 jt.). Ühiskonnas toimuvate kiirete muutuste ajal on olemas oht, et inimesed kaotavad kontrolli toimuva üle — sisemine kontrollkese asendub välisega. Inimesed ei saa aru, mis toimub, ei suuda struktureerida ega seletada ümbritsevat, elavad üle kontrolli kaotust, ei suuda prognoosida, mida toob neile homme päev (Averill 1973; Settles 1987). Selle tulemuseks võib olla lootusetus, ärevus, depressioon, motivatsioonipuudus. Muutuvas olukorras uusi struktuure luua suutvad inimesed tunnevad sageli muutuvatest oludest rõõmu, neid haarab uute võimaluste nägemisest põhjustatud ideede tulv, optimism ja aktiivsuse tõus (Kobasa 1985). Ühiskonnas toimuv transformatsiooniprotsess paneb proovile inimeste toimetulekuressursid, millest omakorda sõltub nende subjektiivse heaolu tase.

Joonis 1. Sotsiaalse stressi ja toimetuleku hüpoteetiline mudel

**SÕLTUMATUD  
MUUTUJAD****VAHENDAVID  
PROTSESSID***Stressorsündmuse  
hindamine**Toimetulek***ADAPTIIVNE  
VÄLJUND**

## MEETOD JA VALIM

### *Uurimuse teoreetilised lähtekohad*

Käesolev sotsiaalse stressi uurimus lähtub hüpoteetilisest sotsiaalse stressiga kohanemise mudelist (joonis 1), mille aluseks on Lazaruse ja Folkmani (1984) ning Bordeni (1991) stressi ja toimetuleku mudel.

**Sõltumatud muutujad: vastaja sugu, vanus ja rahvus.** Bioloogiliste stressimudelite implitsiitse eelduse järgi lähtub indiviidi stress välistest, objektiivsetest nõudmistest ja asjaoludest. Stressiga toimetuleku mudeli kohaselt mõjustavad sõltumatud muutujad väljendunud stressi taset (Monat, Lazarus 1985: 3). Käesolevas uurimuses on vastaja sugu, vanust ja rahvust käsitletud kui sõltumatuid muutujaid, millest oleneb situatsiooni kognitiivne hindamine ja toimetulek. Püstitatud hüpoteesi kohaselt mõjutavad nimetatud demograafilised karakteristikud vastaja sotsiaalse situatsiooni taju ja selle kaudu tema käitumist ning psühholoogilist (subjektiivset) heaolu kui adaptiivset väljundit.

**Vahendavad protsessid: situatsiooni hindamine ja toimetulek.** Sotsiaalseid muutusi võib vaadelda kui stressorsündmuse, millele saab anda erinevaid hinnanguid, kusjuures erinevus stressorsündmuse nägemises viib ka erinevale stressi tasemele. Kui indiviid tajub situatsiooni soovitava, saame rääkida tema kognitiivsest kontrollist stressori üle. Vastupidi aga — tajudes sündmust ebasobivana, subjekti suhtes väliste jõudude poolt determineerituna — tekib subjekti passiivsus ja tunne, et tema ei saa siin midagi muuta. Tajutud kognitiivne kontroll stressorsündmuse üle pehmendab stressori mõju ja suurendab toimetulekuressursse (Rothbaum, Snyder, Weisz 1982).

Toimetulekustrateegiaid on erinevad stressiuurijad määratlenud kui probleemikeskseid, kui eesmärgiks on stressoringimuste muutmine, ja emotsioonikeskseid, kui eesmärgiks on stressi emotsionaalse mõju vähendamine (Borden 1991; Lazarus, Folkman 1984; Monat, Lazarus 1985). Käesolevas uurimuses on püstitatud hüpotees, et kõrgema distressitasemega vastajad kasutavad sagedamini negatiivse suunaga emotsioonikeskseid toimetulekustra-

teegiaid ja soovmõtlemist, mis blokeerivad subjekti isiklikud eesmärgid ja aktiivsuse. Nende strateegiatega stressialandav mõju on nõrk. Madala distressitasemega vastajad aga kasutavad sagedamini positiivseid emotsioonikeskseid toimetulekustrateegiaid ja probleemide konstruktiivset lahendamist, sest nad näevad stressorsündmustes uusi võimalusi ja perspektiive tegutsemiseks.

**Adaptiivne väljund: psühholoogiline (subjektiivne) heaolu.** Mõistet "psühholoogiline heaolu" võib kasutada stressi adaptiivse väljundi indikaatorina (Larson 1978). Lähtehüpoteesi kohaselt oleneb indiviidi psühholoogilise heaolu tase vastaja demograafilistest muutujatest mõjutatud sotsiaalsete muutuste subjektiivsest tajust ja rakendatud toimetulekustrateegiatest.

### *Materjal*

Sotsiaalse stressi küsimustiku on koostanud autor. Lisatud on mõned väited Michigani Ülikooli Sotsiaaluuringute Instituudi intervjuuprojektist *Self-concept over the life-span* (1991). Küsimustiku koostamisel on lähtutud neljast dimensioonist: subjekti aktiivsus-passiivsus; tajutud kontrollkese (seesmine ja väline); eluorientatsioon (orienteeritus minevikule, olevikule või tulevikule) ja emotsionaalne staatus (deprimeeritud või stimuleeritud). Küsimustik järgib Folkmani ja Lazaruse (1980) koostatud probleemikeskset ja emotsioonikeskset toimetulekutaksonoomiat. Küsimustiku esimene osa koosneb 16 Likerti tüüpi väitest, millega vastaja sai nõustuda või ei saanud ("täiesti nõus"; "enam-vähem nõus"; "pigem ei ole nõus"; "üldse ei ole nõus"). Küsimustiku teises osas on esitatud 11 emotsionaalset seisundit. Vastajal tuli otsustada, kuidas ta viimase kahe nädala jooksul on seda kogunud ("pidevalt"; "sageli"; "harva"; "mitte kordagi"). Sõltumatute muutujatena on lisatud vastaja sugu, vanus ja rahvus.

Üks esitatud väidetest ("Igal asjal on oma hea ja halb külg") oli sedavõrd madala eristusjõuga vastajate vahel, et ta on käesolevast analüüsist välja jäetud.

## Sotsiaalne stress Eestis

### Valim

Käesolev küsimustik oli lisatud EMORi poolt igakuiselt kogutava riigi statistika projekti "Pere-eelarvete uuring" juurde 1993. aasta märtsis-aprillis. Leibkondade koguvallimist (2000 leibkonda) moodustati juhuvalim 1000 täiskasvanud perekonnaliikmest. Lõplikuks valimiks kujunes 809 vastajat (349 meest ja 460 naist), vastamisprotsent on 81.

**Tabel 1**

Valimi demograafiline iseloomustus (N=809)

Muutuja	%	N	Keskmine
<b>Sugu</b>			
Mees	43,1	349	
Naine	56,9	460	
<b>Rahvus</b>			
Eestlane	80,5	652	
Mitte-eestlane	19,4	157	
<b>Vanus</b>			43,7
Noored (18 < 30)	23,8	193	
M	23,5	82	
N	24,1	111	
Noorem keskiga (31 < 45)	36,8	298	
M	37,5	131	
N	36,3	167	
Keskiga (46 < 60)	22,5	182	
M	22,1	77	
N	22,8	105	
Vanem iga (61 <)	16,8	136	
M	16,9	59	
N	16,7	77	

Vastanute keskmine vanus on 43,7 aastat, vahemikus 18 kuni 74 aastat (tabel 1). Kõik vastajad on jagatud nelja vanuserühma:

18 < 30-aastased (noored); 31 < 45-aastased (noorem keskiga); 46 < 60-aastased (vanem keskiga); 61 < -aastased (vanem iga).

Vastajad on rahvuse alusel jagatud kahte gruppi: eestlased (80,5%) ja mitte-eestlased (19,4%). Sotsiaalset stressi uuritakse ajal, mil eestlased taastavad rahvusriiki ja õigusi oma põlisel alal. On selge, et sellisel rahvusliku identiteedi rõhutamise perioodil võivad teised Eestis elavad rahvusgrupid sattuda autsaideri rolli. Arvestades antud uurimuse spetsiifilisust, ei peeta täpsemat rahvusgruppide eristamist vajalikuks.

### *Andmeanalüüs*

Sotsiaalse stressi hüpoteetilist mudelit uuritakse mitme kvantitatiivse analüüsi meetodi abil. Hinnangutevahelisi erinevusi erinevates gruppides on kontrollitud **t-testi** ja **Kruskal—Wallise testi** abil. Toimetulekuressursse uuritakse hinnangute **faktoranalüüsiga**; faktoranalüüsis kõrgemate faktorlaadungitega tunnuste kooskõla on hinnatud **Cronbachi alfa** kaudu. **Klasteranalüüs** võimaldab vastajaid rühmitada erineva subjektiivse heaolutaseme järgi. Klasteritevaheline statistiline erinevus on hinnatud **Bartletti testi** abil. Kõik otsustused on tehtud olulisuse nivool  $p < 0,05$ .

## TULEMUSED

**Sugu.** Sugudevahelised erinevused hinnangutes ilmnevad ühe-teistkümmne väite korral kahekümne kuuest, kusjuures naiste vastused on suunaga kõrgema emotsionaalsuse poole (tabel 2). Naised tunnevad rohkem hirmu tuleviku ees, teevad vähem plaane tuleviku suhtes, on viimase kahe nädala jooksul tundnud väsimust, kurbust ja üksindust sagedamini kui mehed. Meeste hinnangutes on rohkem enesekindlust ja uute väljavaadete nägemist.

**Rahvus.** Eestlaste ja mitte-eestlaste grupis väljenduvad statistiliselt erinevad hinnangud peaaegu kõikide esitatud väidete korral (tabel 2). Mitte-eestlased kogevad vähem ühtsustunnet Eesti ühiskonna arengu suhtes, neil on vähem kontrolli stressorsündmuste üle ja vähem turvatunnet tuleviku suhtes kui eestlastest vastajatel. Hinnangutes peegeldub selgelt eesti ja mitte-eesti elanikkonna polarisatsioon rahvusriigi taastamise ajal. On ilmne,

**Tabel 2.** Keskmised hinnangud, hinnangute erinevus ( $p < 0,05$ )

Väide

- 
1. Ma vaatan lootustega tulevikku .....
  2. Asjad lähevad oma rada ja mina ei saa siin midagi muuta .....
  3. Mulle tundub, et olen "rongist maha jäänud" .....
  4. Arvan, et minu aeg on veel ees .....
  5. Tihti leian ennast mõtlemas sellest, mida olen ära teinud, harvem sellest, mida tegema peaksin .....
  6. Ma mõtlen rohkem oma tulevikule kui olevikule või minevikule ...
  7. Mu elu võiks olla õnnelikum, kui ta on praegu .....
  8. Elada tuleb tänasele päevale, sest elu juhivad juhused .....
  9. Kui ma midagi planeerin, siis teen kõik selleks, et oma plaane ellu viia .....
  10. Ma pean end õnnelikuks inimeseks .....
  11. Ma suudan oma huve kaitsta .....
  12. Minu elu on palju mõjutanud inimesed võimukoridoridest .....
  13. Praeguses olukorras ei pea ma õigeaks plaane pika aja peale ette teha
  14. Kui ma midagi saavutanud olen, siis ikka suure tööga .....
  15. Mulle ei lähe korda, mis Eestis toimub .....
  16. Viimase kahe nädala jooksul olen tundnud väsimust .....
  17. Viimase kahe nädala jooksul olen tundnud kurvameelsust .....
  18. Viimase kahe nädala jooksul olen tundnud uusi lootusi tärkavat ...
  19. Viimase kahe nädala jooksul olen tundnud uusi huvitavaid mõtteid.
  20. Viimase kahe nädala jooksul olen tundnud hirmu tuleviku ees .....
  21. Viimase kahe nädala jooksul olen tundnud muret rahaasjade pärast.
  22. Viimase kahe nädala jooksul olen tundnud õnne .....
  23. Viimase kahe nädala jooksul olen tundnud üksindust .....
  24. Viimase kahe nädala jooksul olen tundnud inimeste vastutulelikkust
  25. Viimase kahe nädala jooksul olen tundnud elust mõnu .....
  26. Viimase kahe nädala jooksul olen tundnud lootusetust .....

et paljud mitte-eesti elanikkonnaga seotud probleemid pole veel lahendatud ja mitte-eestlaste integreerimine Eesti ühiskonda on alles algusjärgus.

**Vanus.** Hinnangute grupeerimine vanusegruppide järgi toob esile olulised gruppidevahelised erinevused (tabel 2a). Noorem vanusegrupp on selgema tulevikuorientatsiooniga, nad arvavad, et nende aeg tegutsemiseks on veel ees. Vastajad vanematest vanusegruppidest on aga vastupidi sagedamini minevikku pööratud, nostalgilised, mõeldes oma tehtud tööle ja saavutustele. Vanemad

ja standardhälbed soo ning rahvuse järgi.

Mehed		Naised		p	Eestlased		Muulased		p
Keskm.	SD	Keskm.	SD		Keskm.	SD	Keskm.	SD	
1,9	0,9	1,8	0,8		1,8	0,8	2,0	0,8	*
2,1	1,0	1,9	0,9	*	2,1	1,0	1,7	0,8	*
2,7	1,0	2,7	1,0		2,8	1,0	2,5	1,1	*
2,3	1,0	2,4	1,0		2,4	1,0	2,2	1,1	*
2,4	1,0	2,5	1,0		2,6	1,0	2,0	0,9	*
1,8	0,9	1,9	0,9		1,9	0,9	1,7	0,9	*
1,7	0,8	1,6	0,8		1,7	0,8	1,5	0,7	*
2,4	1,1	2,2	1,0	*	2,3	1,0	1,9	1,0	*
1,7	0,7	1,6	0,7		1,6	0,7	1,9	0,8	*
2,4	0,8	2,3	0,8		2,3	0,8	2,3	1,0	
2,0	0,9	2,2	0,9	*	2,1	0,9	2,2	1,1	
2,7	1,1	2,9	1,1	*	2,8	1,1	2,4	1,2	*
1,9	0,9	1,7	0,9	*	1,8	0,9	1,7	0,9	*
1,6	0,7	1,5	0,7		1,5	0,7	1,4	0,7	*
3,2	1,0	3,2	1,0		3,5	0,8	2,1	1,1	*
2,3	0,8	2,2	0,8	*	2,3	0,8	2,1	0,9	*
3,0	0,8	2,7	0,9	*	2,9	0,8	2,5	1,0	*
2,6	0,8	2,7	0,8		2,6	0,8	2,8	0,9	
2,5	0,8	2,7	0,8	*	2,6	0,8	2,8	1,0	*
2,9	1,0	2,7	1,0	*	2,9	0,9	2,2	1,0	*
1,9	0,9	1,9	0,9		1,9	0,9	1,7	0,9	*
2,8	0,8	2,8	0,8		2,8	0,7	2,9	0,9	
3,3	0,8	3,2	0,9	*	3,2	0,8	3,0	1,0	*
2,5	0,7	2,3	0,7	*	2,4	0,7	2,3	0,8	*
2,7	0,7	2,8	0,8		2,7	0,7	3,0	0,7	*
3,2	0,9	3,1	0,9		3,3	0,8	2,7	1,1	*

vastajad tunnevad vähem kontrolli sündmuste üle, uued elusituatsioonid ei paku just suuri väljavaateid.

#### *Sotsiaalse stressiga toimetulekut determineerivad faktorid*

Faktoranalüüsil pööratud faktormatriksi meetodil eristus 4 faktorit nii meeste kui naiste alammassiivis (faktorite kirjeldatus 42%).

Faktorid on saanud oma nime tunnuste järgi, millel on antud faktoriga kõige suurem seos (tabel 3).

**Tabel 2a.** Keskmised hinnangud, hinnangute erinevus ( $p < 0,05$ )

Väide

- 
1. Ma vaatan lootustega tulevikku . . . . .
  2. Asjad lähevad oma rada ja mina ei saa siin midagi muuta . . . . .
  3. Mulle tundub, et olen "rongist maha jäänud" . . . . .
  4. Arvan, et minu aeg on veel ees . . . . .
  5. Tihti leian ennast mõtlemas sellest, mida olen ära teinud, harvem sellest, mida tegema peaksin . . . . .
  6. Ma mõtlen rohkem oma tulevikule kui olevikule või minevikule . . . . .
  7. Mu elu võiks olla õnnelikum, kui ta on praegu . . . . .
  8. Elada tuleb tänasele päevale, sest elu juhivad juhused . . . . .
  9. Kui ma midagi planeerin, siis teen kõik selleks, et oma plaane ellu viia . . . . .
  10. Ma pean end õnnelikuks inimeseks . . . . .
  11. Ma suudan oma huve kaitsta . . . . .
  12. Minu elu on palju mõjutanud inimesed võimukorridoridest . . . . .
  13. Praeguses olukorras ei pea ma õigeks plaane pika aja peale ette teha . . . . .
  14. Kui ma midagi saavutanud olen, siis ikka suure tööga . . . . .
  15. Mulle ei lähe korda, mis Eestis toimub . . . . .
  16. Viimase kahe nädala jooksul olen tundnud väsimust . . . . .
  17. Viimase kahe nädala jooksul olen tundnud kurvameelsust . . . . .
  18. Viimase kahe nädala jooksul olen tundnud uusi lootusi tärkavat . . . . .
  19. Viimase kahe nädala jooksul olen tundnud uusi huvitavaid mõtteid . . . . .
  20. Viimase kahe nädala jooksul olen tundnud hirmu tuleviku ees . . . . .
  21. Viimase kahe nädala jooksul olen tundnud muret rahaasjade pärast . . . . .
  22. Viimase kahe nädala jooksul olen tundnud õnne . . . . .
  23. Viimase kahe nädala jooksul olen tundnud üksindust . . . . .
  24. Viimase kahe nädala jooksul olen tundnud inimeste vastutulelikkust . . . . .
  25. Viimase kahe nädala jooksul olen tundnud elust mõnu . . . . .
  26. Viimase kahe nädala jooksul olen tundnud lootusetust . . . . .

**1. faktor: frustreritus.** Faktor väljendub rahulolematuses oma eluga ja negatiivsetes tunnetes viimase kahe nädala jooksul. See faktor determineerib negatiivseid emotsioonikeskseid toimetulekustrateegiaid ning on sagedamini esindatud vastajate vanemates vanusegruppides. Sellega on tugevamalt seotud väited nr 7, 16, 17, 20, 21, 23, 25 ja 26 (Cronbachi  $\alpha$  on 0,77).

ja standardhälbed vanusegruppide järgi.

18 < 30		31 < 45		46 < 60		61 <		p
Keskm.	SD	Keskm.	SD	Keskm.	SD	Keskm	SD	
1,6	0,7	1,8	0,8	1,9	0,8	2,1	1,0	*
2,3	1,0	2,2	1,0	1,8	0,9	1,4	0,7	*
3,0	0,9	2,9	0,9	2,5	1,0	2,1	1,0	*
1,6	0,6	2,2	0,9	2,8	1,0	3,3	0,9	*
2,6	0,9	2,6	1,0	2,3	1,0	2,0	0,9	*
1,7	0,8	1,7	0,8	1,9	1,0	2,1	1,1	*
1,7	0,8	1,7	0,8	1,6	0,8	1,6	0,7	*
2,3	1,0	2,4	1,0	2,2	1,1	1,9	1,1	
1,7	0,7	1,6	0,6	1,6	0,7	1,7	0,9	*
2,2	0,7	2,3	0,8	2,5	0,9	2,6	1,0	
2,0	0,8	2,0	0,8	2,1	0,9	2,5	1,0	*
3,0	1,0	2,9	1,0	2,7	1,2	2,3	1,2	*
2,0	0,9	1,8	0,9	1,7	0,9	1,5	0,9	*
1,9	0,8	1,5	0,7	1,4	0,6	1,2	0,4	*
3,1	1,0	3,2	1,0	3,5	0,9	3,1	1,1	*
0,7	2,2	0,8	2,2	0,9	2,0	0,8		*
2,9	0,7	2,9	0,8	2,8	0,9	2,7	1,0	*
2,4	0,8	2,7	0,7	2,7	0,8	3,0	0,8	
2,4	0,8	2,6	0,8	2,7	0,8	3,0	0,9	*
3,0	0,9	2,8	1,0	2,7	1,1	2,5	1,1	*
1,9	0,8	2,0	0,9	1,9	0,9	1,8	0,9	*
2,5	0,7	2,7	0,7	2,9	0,7	3,2	0,8	
3,2	0,8	3,3	0,8	3,2	0,9	3,1	1,0	*
2,4	0,7	2,4	0,7	2,4	0,8	2,2	0,8	
2,6	0,7	2,7	0,7	2,8	0,7	3,0	0,7	*
3,3	0,8	3,2	0,9	3,1	0,9	2,9	1,1	*

**2. faktor: õnnelikkus.** See faktor determineerib positiivseid emotsioonikeskseid toimetulekustrateegiaid. Sotsiaalsed muutused on andnud uusi ideid ja lootusi tuleviku suhtes, kuid ka otsustamise edasilükkamist, kuna aega veel on. Õnnelikkusefaktor iseloomustab nooremate vanusegruppide reaktsioone stressor-sündmustele. Sellega on tugevamalt seotud väited nr 4, 10, 18, 19, 22 ja 25 (Cronbachi  $\alpha$  on 0,82).

**3. faktor: passiivsus.** Faktor väljendab kontrolli kaotust situatsiooni üle, jõuetust ja motiveerimatust midagi muuta püüda.

Tabel 3. Hinnangute pööratud

Väide
1. Ma vaatan lootustega tulevikku .....
2. Asjad lähevad oma rada ja mina ei saa siin midagi muuta .....
3. Mulle tundub, et olen "rongist maha jäänud" .....
4. Arvan, et minu aeg on veel ees .....
5. Tihti leian ennast mõtlemas sellest, mida olen ära teinud, harvem sellest, mida tegema peaksin .....
6. Ma mõtlen rohkem oma tulevikule kui olevikule või minevikule ...
7. Mu elu võiks olla õnnelikum, kui ta on praegu .....
8. Elada tuleb tänasele päevale, sest elu juhivad juhused .....
9. Kui ma midagi planeerin, siis teen kõik selleks, et oma plaane ellu viia .....
10. Ma pean end õnnelikuks inimeseks .....
11. Ma suudan oma huve kaitsta .....
12. Minu elu on palju mõjutanud inimesed võimukoridoridest .....
13. Praeguses olukorras ei pea ma õigeks plaane pika aja peale ette teha
14. Kui ma midagi saavutanud olen, siis ikka suure tööga .....
15. Mulle ei lähe korda, mis Eestis toimub .....
16. Viimase kahe nädala jooksul olen tundnud väsimust .....
17. Viimase kahe nädala jooksul olen tundnud kurvameelsust .....
18. Viimase kahe nädala jooksul olen tundnud uusi lootusi tärkavat ...
19. Viimase kahe nädala jooksul olen tundnud uusi huvitavaid mõtteid .
20. Viimase kahe nädala jooksul olen tundnud hirmu tuleviku ees .....
21. Viimase kahe nädala jooksul olen tundnud muret rahaasjade pärast .
22. Viimase kahe nädala jooksul olen tundnud õnne .....
23. Viimase kahe nädala jooksul olen tundnud üksindust .....
24. Viimase kahe nädala jooksul olen tundnud inimeste vastutulelikkust
25. Viimase kahe nädala jooksul olen tundnud elust mõnu .....
26. Viimase kahe nädala jooksul olen tundnud lootusetust .....
Vanus .....
Kirjeldatuse protsent .....

Blokeeritud eesmärgid ja tulevikuorientatsiooni puudus peegeldavad vastaja eraldatust ja soovmõtlemist kui toimetulekustrateegiat sagedamini vanemates vanusegruppides. Selle faktoriga on tugevamalt seotud väited nr 2, 3, 5, 8, 12, 13 ja 14 (Cronbachi  $\alpha$  on 0,66).

faktormatriks sugude järgi.

Faktorkaalud							
Mehed				Naised			
F1	F2	F3	F4	F1	F2	F3	F4
-.193	<b>.362</b>	-.132	<b>.471</b>	-.242	<b>.361</b>	-.205	<b>.392</b>
.197	-.055	<b>.626</b>	-.219	.146	-. <b>312</b>	<b>.596</b>	-.034
.185	-.267	<b>.474</b>	-. <b>357</b>	.270	-.213	<b>.435</b>	-. <b>338</b>
.223	<b>.547</b>	-. <b>324</b>	<b>.311</b>	-.033	<b>.761</b>	-.186	.124
.278	-.014	<b>.491</b>	-.118	.102	-.023	<b>.631</b>	-.015
.206	.124	-.034	<b>.640</b>	.204	<b>.421</b>	.148	<b>.385</b>
<b>.491</b>	-.092	<b>.307</b>	.230	<b>.434</b>	.032	.284	.257
<b>.358</b>	.114	<b>.510</b>	-.273	.030	-.098	<b>.499</b>	.014
-.079	.171	.124	<b>.581</b>	-.160	.038	-.042	<b>.735</b>
-. <b>318</b>	<b>.636</b>	-.091	.019	-. <b>614</b>	<b>.388</b>	.099	.103
.282	<b>.455</b>	-.091	<b>.405</b>	-. <b>301</b>	<b>.311</b>	-.217	<b>.406</b>
.189	-.150	<b>.339</b>	.049	.104	.013	<b>.525</b>	-.040
.016	-.070	<b>.624</b>	.063	.072	-.128	<b>.455</b>	.150
.064	-.031	<b>.595</b>	<b>.353</b>	.102	-. <b>344</b>	<b>.340</b>	<b>.424</b>
<b>.370</b>	.240	.116	-. <b>477</b>	.293	.209	<b>.432</b>	-. <b>325</b>
<b>.472</b>	-.270	.097	.061	<b>.404</b>	-.198	.189	-.087
<b>.664</b>	-.191	.041	-.077	<b>.716</b>	-.048	.153	-.085
-.031	<b>.571</b>	-.067	<b>.332</b>	-. <b>352</b>	<b>.565</b>	.001	.087
-.104	<b>.558</b>	-.077	.246	-. <b>365</b>	<b>.557</b>	-.043	.141
<b>.721</b>	-.126	.229	-.168	<b>.610</b>	-.054	<b>.390</b>	-.032
<b>.566</b>	-.060	.180	.054	<b>.497</b>	.093	<b>.302</b>	.087
-.172	<b>.702</b>	-.138	-.075	-. <b>562</b>	<b>.488</b>	-.066	-.113
<b>.509</b>	-.172	-.126	-.056	<b>.512</b>	-.000	.090	-.117
-.142	<b>.321</b>	.162	.048	-. <b>469</b>	.080	.174	.145
-. <b>300</b>	<b>.566</b>	-.026	.024	-. <b>596</b>	<b>.433</b>	-.058	-.019
<b>.683</b>	-.127	.159	-.209	<b>.648</b>	-.069	<b>.372</b>	-.086
.200	<b>.461</b>	-. <b>546</b>	.008	.109	<b>.680</b>	-. <b>394</b>	-.061
12.3	11.6	10.1	8.0	14.8	10.9	10.2	6.5

**4. faktor: tulevikku orienteeritus.** See faktor viitab muutuste positiivsele hinnangule ja determineerib probleemikeskseid toimetulekustrateegiaid. Ta on nõrgem kui teised faktorid ega ole statistiliselt sagedamini esindatud üheski vanusegrupis. Ka selle faktoriga tugevamini seotud tunnuste (väited nr 1, 3, 6, 9, 11 ja 15)

### *Sotsiaalne stress Eestis*

seemine kooskõla on madal ning statistiliselt ebaoluline (Cronbachi  $\alpha$  on 0,38).

#### *Vastanute psühholoogiline heaolu*

Vastanute psühholoogiline heaolu sotsiaalse stressi adaptiivse väljundina on välja toodud klasteranalüüsi abil. Klasteranalüüsi käigus eristub kaks klasterit meeste ja kolm klasterit naiste hulgas (tabel 4). Hinnangutevaheline erinevus klasterite vahel tõestub tasemel  $p < 0,001$ , välja arvatud üks väide ("Ma mõtlen rohkem oma tulevikule kui olevikule või minevikule"). Klasteritesse gruppeerunud vastajate vanus on oluliselt erinev: nii meeste kui ka naiste teise klasterisse on koondunud kõrgema vanusega vastajad, esimesse aga nooremad vastajad. Teise klasterisse on koondunud ka suhteliselt rohkem mitte-eestlastest vastanuid, kusjuures esimene klaster koosneb rohkem eestlastest vastajatest (tabel 4).

Klasteranalüüsi abil saadud vastanute grupid erinevad üksteisest erinevate toimetulekufaktorite esindatuse ja erineva subjektiivse heaolutaseme poolest. Subjektiivse heaolutaseme kirjeldamisel lähtutakse faktoranalüüsis antud faktoriga tugevamini seotud hinnangutest ja vaadeldakse, kuivõrd on vastajad erinevatest klasterühmadest nõustunud nimetatud väidetega.

**Meeste ja naiste esimene klaster** on kirjeldatav kui suhteliselt kõrge psühholoogilise heaolu tasemega vastajate grupp, moodustades 58,4% meeste ja 39,7% naiste alammassiivist. Statistiliselt on nad tõenäoliselt nooremad inimesed (70% meestest ja 78% naistest on alla 45-aastased) ja eestlased (64% meestest ja 45% naistest, vt tabel 4). Neid iseloomustab madal frustratsioon, kõrge aktivatsioon ja osalustunne sotsiaalsetes muutustes ning minevikupööratuse puudumine (joonised 2–5). Vastanud sellest grupist tunnevad elust mõnu, muutused ühiskonnas on nende jaoks soodsad, olgugi et umbes veerand neist tunneb muret rahaasjade pärast. See osutab küll pigem meie maa viletsale majanduslikule seisule.

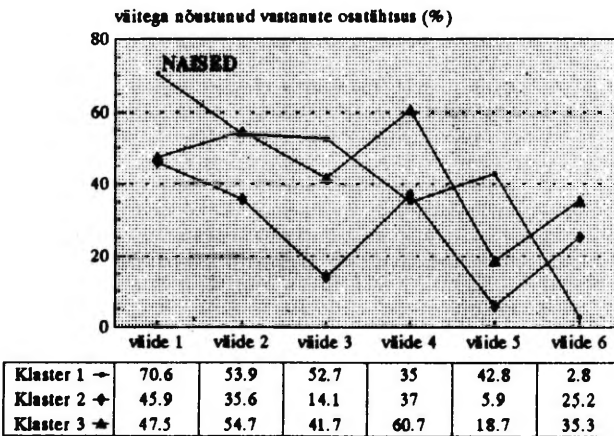
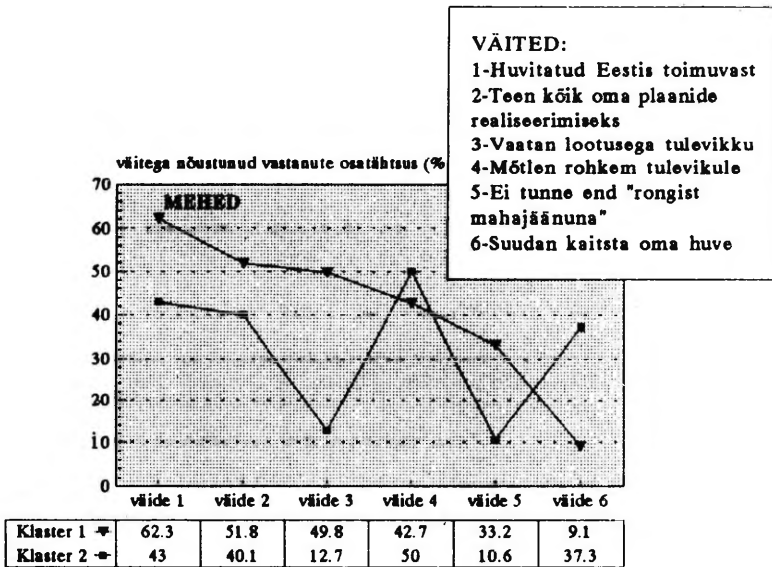
**Meeste ja naiste teine klaster** koondab madala subjektiivse heaolutasemega vastajaid. Nad moodustavad 41,6% meeste ja 29,7% naiste alammassiivist. Sagedamini on nad vanemad inimesed (54% meestest ja 61% naistest on üle 45 aasta vanad)

**Tabel 4**  
Meeste ja naiste klasterühmade jagunemine  
vanuse ja rahvuse järgi.

	Mehed			Naised			
	Kl-1	Kl-2	Kokku	Kl-1	Kl-2	Kl-3	Kokku
N	199	142	341	180	135	139	454
<b>Vanus</b>							
18 < 30 (%)	71,9	28,1	100	56,4	18,6	25,0	100
31 < 45 (%)	61,4	38,6	100	47,9	19,8	32,3	100
46 < 60 (%)	48,0	52,0	100	28,9	39,4	31,7	100
61 < (%)	37,3	62,7	100	12,0	56,0	32,0	100
18 < 30 (%)	31,2	12,0	23,5	33,9	14,1	19,4	24,1
31 < 45 (%)	39,2	33,8	37,5	44,4	24,4	38,9	36,3
46 < 60 (%)	18,6	28,2	22,1	16,7	30,4	23,7	22,8
61 < (%)	11,1	26,1	16,9	5,0	31,1	18,0	16,7
Kokku	100	100	100	100	100	100	100
Keskm. vanus	40,3	49,5	44,9	37,2	50,9	45,2	44,4
SD	15,2	14,7		12,9	16,2	15,1	
<b>Rahvus</b>							
Eestlased (N)	178	100	278	165	103	98	366
(%)	64,0	36,0	100	45,1	28,1	26,8	100
Mitte-eestl. (N)	21	42	63	15	32	41	88
(%)	33,3	66,7	100	17,0	36,4	45,6	100

ja mitte-eestlased (67% meestest ja 36% naistest). Teise klasterisse koondunud on frustreritud, minevikkupööratud ja passiivsed (joonised 2–5). Umbes kolmveerand nendest ei ole oma eluga rahul, frustreritus väljendub väsimuses, elamises tänasele päevale, tulevikuperspektiivide puudumises ja sisemise kontrollkeskme nõrkuses. Nad väidavad, et ei suuda kaitsta oma isiklike huve ja et nende aeg on juba möödas. Üks põhimuredest on seotud raha vähesusega. Nende kognitiivne kontroll on pööratud minevikku. Sotsiaalsete muutuste tõttu on nad passiivsed ja nostalgilised: nad

Sotsiaalne stress Eestis



Joonis 2. Frustratsiooni väljendavate muutujate jaotus klastrite lõikes

ei pea õigeks praeguses olukorras plaane ette teha, nende situatsioonihinnangust peegeldub ebakindlust ja määramatust. Umbes kolmandik soostub väitega, et nende aeg on möödas, et nad on "rongist maha jäänud". Suhteliselt paljud (37% meestest ja 35% naistest teises klastris) seostavad oma minevikku mõjukate inimestega võimukoridoridest.

**Kolmas klaster** on spetsiifiliselt eristunud vaid naissoost vastajate puhul, moodustades 30,6% naiste alammassiivist. Klastrisse on rühmitunud keskmise heaolutasemega vastajad. Nende vastused on tihti ambivalentseid: ühelt poolt väljendavad nad suhteliselt kõrget frustratsioonitaset ja nostalgiat, teiselt poolt aga positiivset seostatust sotsiaalsete muutustega ja orienteeritust tulevikku (joonised 2–5). Vastajad on keskmise vanusetasemega, sagedamini mitte-eesti soost (tabel 4).

## KOKKUVÕTE

Suurenev sotsiaalne stress indiviidi tasandil langeb kokku võimaluste ja potentsiaalsete ressursside kasvuga ühiskonnas. Sotsiaalsed muutused pakuvad uusi perspektiive, kuid samas loovad tingimusi ka uuteks raskusteks ja probleemideks. Aktiivsed ja ettevõtlikud inimesed, kes näevad Eesti arengu uusi perspektiive, tunnevad selles ka suuremat osalust. Sotsiaalse distressi seisundis inimesed aga on vastupidiselt frustratsioonitaset ja minevikku pööratud, kontrollkeskme kaotusest tingituna kogevad nad motiveerimatust ja jõuetust midagi ise mõjutada või muuta. Nad on ühiskonnast võõrdunud.

Klasteranalüüs tõi esile riskigrupi vastanutest, keda iseloomustab kõrge sotsiaalse distressi tase. Nad moodustavad 41% küsitletud meestest ja 30% küsitletud naistest. Sagedamini on nad ealt vanemad (63% meestest ja 56% naistest vanuses 61 aastat ja vanemad) ja mitte-eestlased (67% mitte-eesti meestest ja 36% naistest).

Miks just vanemad inimesed kogevad rohkem sotsiaalset distressi?

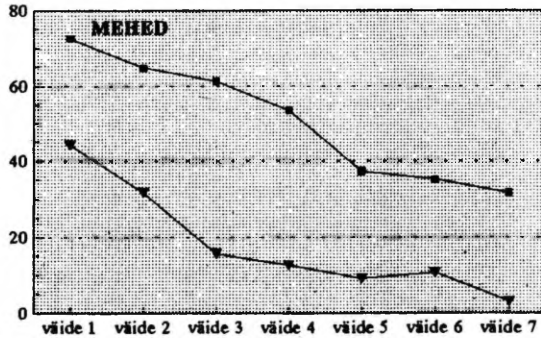
1. On teada, et kogu inimese eluea kestev sotsialiseerumisprotsess vanuse kasvades aeglustub. Järjest raskemaks läheb kohanemi-

Sotsiaalne stress Eestis

VÄITED:

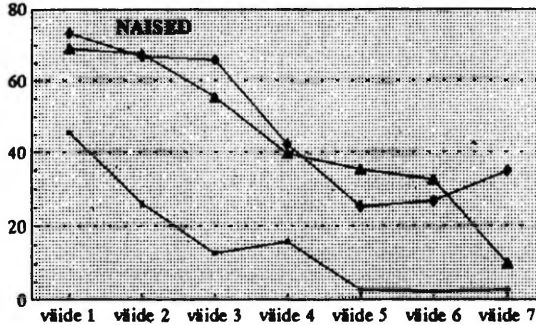
- 1-Kui ma midagi saavutanud olen, siis ikka suure tööga
- 2-Praeguses olukorras ei pea ma plaanide ettegemist õigeks
- 3-Asjad lähevad oma rada ja mina ei saa siin midagi muuta
- 4-Elada tuleb tänasele, sest elu kontrollivad juhused
- 5-Minu elu on palju mõjutanud inimesed võimukorridoridest
- 6-Ma mõtlen rohkem oma minevikule kui olevikule või tulevikule
- 7-Mulle tundub, et olen "rongist maha jäänud"

Väitega täielikult nõustunud vastanute osatähtsus (%)



Klaster 1	→	44.2	31.7	15.6	12.6	9.1	10.6	3
Klaster 2	→	72.5	64.8	61.3	53.5	37.3	35.2	31.7

Väitega täielikult nõustunud vastanute osatähtsus (%)



Klaster 1	→	45.6	26.1	12.8	16.1	2.8	2.2	2.8
Klaster 2	→	73.3	66.7	65.9	42.2	25.2	26.7	34.8
Klaster 3	→	69.1	67.6	55.4	39.6	35.2	32.4	10.1

Joonis 3. Passiivsust väljendavate muutujate jaotus klasterite lõikes

ne muutustega keskkonnas, raskemaks läheb ka vanu toimetulekustrateegiaid, mis enam ei toimi, uute vastu vahetada.

2. Kujunenud isiksusel on oma elufilosoofiat muuta raskem kui noortel, kes oma iseseisvat elu alles alustavad. Seetõttu osutub olukord, kus vanad mõttemallid ei aita enam uusi olukordi lahendada, eriti raskeks just vanemate inimeste jaoks.

3. Vanematel inimestel on raskem järsult kasvavatele nõudmistele vastata. Raskem on vahetada harjumuspärast tööd, raskem omandada uusi oskusi.

4. Vanematel inimestel on raskem leida uut töökohta, sest tööjõu ülekülluse tingimustes eelistatakse noori. Maa majanduslik seis on tinginud vanemaealiste senise töö niihästi materiaalse kui ka moraalse madala väärtustatuse.

5. Vanemate inimeste sotsiaalsed müüdid on selgepiirilised, sest nad lähtuvad minevikukogemusest; nende pettumine müütide purunedes aga suurem — neil on lihtsalt jäänud vähem aega olukorra paranemist oodata.

6. Kogu praegune Eesti areng soosib noori ja ettevõtlikke inimesi.

Mis on autori arvates mitte-eestlastest vastanute suurema sotsiaalse distressi põhjuseks?

1. Eestlaste rahvuslik taasärkamine 1987.–1988. aastal ja **eestlaste rahvusriigi** taastamine on mitte-eesti elanikkonna jätnud psühholoogiliselt autsaideri seisundisse.

2. Sageli ei ole Eestis toimunud muutused olnud mitte-eestlastest elanikkonna valik. Seetõttu on neil raskem uusi olukordi konstruktiivsena mõista.

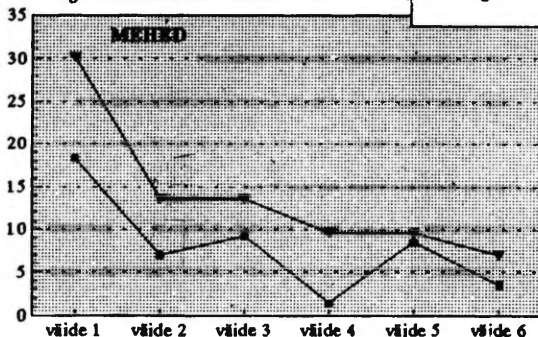
3. Mõned spetsiifiliselt mitte-eesti elanikkonnale esitatavad nõudmised eeldavad situatsiooni täielikku kognitiivset ümberstruktureerimist. Näiteks inimesed, kellele on omane olnud totalitaarses riigis juurutatud suhtumine vene keelesse kui riigikeelesse, peavad keelesituatsiooni enese jaoks ümber mõtestama. Ilma selleta pole võimalik ennast eesti keelt õppima motiveerida. Subjektiivsel tasandil on see lisapinge, mis vajab lahendamist.

4. Paljud õiguslikult reguleerimata olukorrad loovad mitte-eestlastes määramatuse ja sotsiaalse kaitse puudumise tunde.

**VÄITED:**

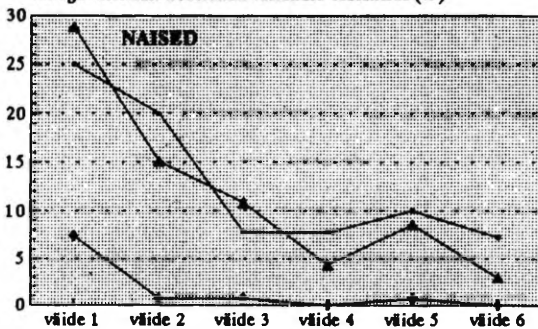
- 1-Arvan, et minu aeg on veel ees
- 2-Ma pean ennast õnnelikuks inimeseks
- 3-Kogenud uusi huvitavaid mõtteid
- 4-Kogenud uusi lootusi tärkavat
- 5-Tundnud elust mõnu
- 6-Kogenud õnne

väitega täielikult nõustunud vastanute osatähtsus



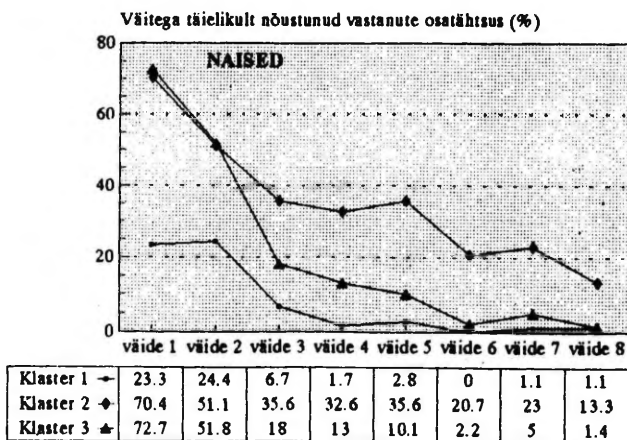
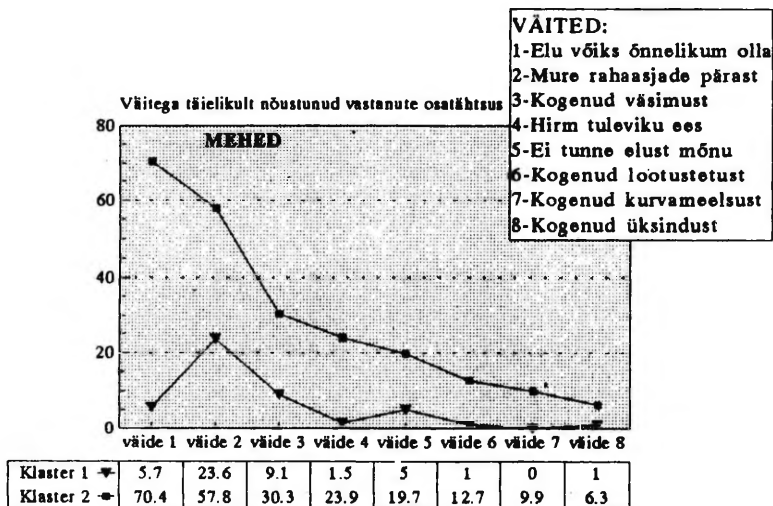
Klaster 1 →	30.1	13.6	13.6	9.6	9.6	7
Klaster 2 →	18.3	7	9.2	1.4	8.5	3.5

väitega täielikult nõustunud vastanute osatähtsus (%)



Klaster 1 →	25	20	7.8	7.8	10	7.2
Klaster 2 →	7.4	0.7	0.7	0	0.7	0
Klaster 3 →	28.8	15.1	10.8	4.3	8.6	2.9

Joonis 4. **Õnnelikkust** väljendavate muutujate jaotus klasterite lõikes



Joonis 5. Tulevikku suunatust väljendavate muutujate jaotus klustrite lõikes

5. Sotsiaalsed müüdid rõhutavad autsaideri rolli, soodustavad võõrdumist Eesti ühiskonnast ja osalustunde puudumist Eesti arengu suhtes, produtseerivad hirme ja ebakindlust tuleviku suhtes. Sotsiaalsed müüdid alandavad kognitiivset kontrolli toimuva üle, tõstes samaaegselt sotsiaalse distressi taset.

Distress ja sellega kaasnev rahulolematuse on psühholoogiline seisund, mis kognitiivsete pingete tõttu ei saa kaua kesta (Festinger 1978; Olson, Schober 1993). Indiviidi ees on kaks võimalust seda pinget alandada — kas muuta situatsiooni vastavalt oma harjumuspärastele elustandarditele või muuta oma elustandardeid ebasoovitavale/kontrollimatule situatsioonile vastavaks. Viimast fenomeni nimetavad Ipsen (1978), Berger-Schmitt (1978) ja Latten (1989) “alistuvaks kohanemiseks”. Kohandades oma elustandardeid ebasoovitava situatsiooni järgi, tuleb indiviid olukorraga toime ja saavutab teatava vaimse tasakaalu seisundi. Olles rahul või alistunud, kaotab indiviid aktiivsuse midagi ette võtta. Käesolevas uurimuses olid need vastajad, kes soostusid väidetega “Mulle tundub, et olen “rongist maha jäänud”” ja “Asjad lähevad oma rada ja mina ei saa siin midagi muuta” ning ei nõustunud väidetega “Arvan, et minu aeg on veel ees” ja “Ma suudan oma huve kaitsta”. Kestev frustratsioon ja passiivsus, samuti alistumine ebasoovitavale situatsioonile kätkevad endas ohtu varjatud depressiooni kujunemiseks. Viimasel ajal on nii psühholoogid kui psühhiaatrid täheldanud rusetud meeleoluga inimeste arvu kasvu abiotsijate hulgas.

### **Kirjandus**

- Averill, J. R. 1973. Personal control over aversive stimuli and its relationship to stress. — *Psychological Bulletin*, 80, pp. 286–303
- Berger-Schmitt R. 1978. Housing: Objective conditions and perceived quality of housing. *German Social Report (Part B, Subjective Well-being)*. W. Zapf, et al. — *Social Indicators Research*, 19, pp. 1–171
- Borden, W. 1991. Stress, coping, and adaptation in spouses of older adults with chronic dementia. — *Social Work Research & Abstracts*, 1, pp. 14–21
- Burke, B. J. 1991. Identity processes and social stress. — *American Sociological Review*, 6, pp. 836–849

- Deacon, B. 1992. East European welfare: past, present, future in comparative context. — *The New Eastern Europe: Social Policy Past, Present and Future*. Ed B. Deacon. SAGE Publications Ltd., pp. 1–30
- Dellenbrant, J. A. 1993. Democracy and poverty. The implementation of social reforms in the countries of Central and Eastern Europe. — *Scandinavian Journal of Social Welfare*, 3, pp. 150–157
- Ferge, Z., J.-E. Kolberg 1992. *Social policy in a changing Europe*. Boulder, CO: Campus/Westview
- Festinger, R. 1978. *Theorie der kognitiven Dissonanz*. Stuttgart: Huber
- Folkman, S., R. S. Lazarus 1980. An analysis of coping in a middle-aged community sample. — *Journal of Health and Social Behavior*, 21, pp. 219–239
- Holmes, T. H., R. H. Rahe 1967. The social readjustment rating scale. — *Journal of Psychosomatic Research*, 11, pp. 213–218
- Ipsen, D. 1978. Das Konstrukt der Zufriedenheit. — *Soziale Welt*, 29, S. 44–53
- Kobasa, S. C. 1985. Stressful life events, personality, and health: An inquiry into hardiness. — *Stress and Coping: An Anthology*. Ed. by A. Monat, R. S. Lazarus. New York: University Press, pp. 174–188
- Kultygina, V. P. 1993. Poverty and social trends in Russia. — *Scandinavian Journal of Social Welfare*, 3, pp. 142–149
- Kutsar, Dagmar, Aavo Trumm 1993. Poverty of households in Estonia. — *Scandinavian Journal of Social Welfare*, 3, pp. 128–141
- Larson, R. 1978. Thirty years of research on the psychological well-being of older Americans. — *Gerontologist*, 23, pp. 109–125
- Lazarus, R. S. 1966. *Psychological stress and the coping process*. New York: McGraw Hill
- Lazarus, R. S., S. Folkman 1984. *Stress, appraisal and coping*. New York: Springer
- Latten, J. J. 1989. Life-course and satisfaction equal for everyone. — *Social Indicators Research*, 21, pp. 599–610
- Life concept over the life-span: Pretest 1*. 1991. The University of Michigan, Survey Research Center, Institute for Social Research
- Marklund, S. 1993. Social policy and poverty in post-totalitarian Europe. — *Scandinavian Journal of Social Welfare*, 3, pp. 104–114
- Marody, M. 1992. Building a competitive society: Challenges for social policy. — *A Background document for the International Seminar "Towards a Competitive Society in Central and Eastern Europe: Social Dimensions"*, Kellokoski, Finland

*Sotsiaalne stress Eestis*

- Mason, J. W. 1975. A historical view of the stress field. Part 1. — *Journal of Human Stress*, 1, pp. 6–12
- Monat, A., R. S. Lazarus 1985. Introduction: Stress and coping — some current controversies. — *Stress and Coping: An Anthology*. Ed. by A. Monat, R. S. Lazarus. New York: University Press, pp. 1–2
- Olson, G. I., B. I. Schober 1993. The satisfied poor: Development of an intervention-oriented theoretical framework to explain satisfaction with a life in poverty. — *Social Indicators Research*, 28, pp. 173–193
- Rothbaum, T., S. S. Snyder, J. R. Weisz 1982. Changing the world and changing the self: A two process model of perceived control. — *Journal of Personality and Social Psychology*, 42, pp. 5–37
- Rotter, J. B. 1966. Generalized expectancies for internal versus external control of reinforcement. — *Psychological Monographs*, 80, p. 609
- Settles, B. H. 1987. A Perspective on tomorrow's families. — *Handbook of Marriage and the Family*. Eds. M. B. Sussmann, S. K. Steinmetz. New York: Plenum Press, pp. 157–180
- Smelser, N. J. 1963. *Theory of collective behavior*. New York: Free Press of Glencoe
- Thoits, P. A. 1991. On merging identity theory and stress research. — *Social Psychology Quarterly*, 54, pp. 101–112
- Toffler, Alvin 1970. *Future shock*. New York: Bantam
- Warzywoda-Kruszynska, W., J. Grotowska-Leder 1993. Poverty and social conditions in Poland during the transformation to a market economy. — *Scandinavian Journal of Social Welfare*, 3, pp. 115–127

DAGMARKUTSAR (sünd. 1951), lõpetas TRÜ psühholoogina 1975. a. Tartu Ülikooli Perekonnaurimiserühma teadur. Uurimisteema: perekonna psühholoogiline ja majanduslik toimetulek üleminekuajal.

# **STUDY III: SOCIETAL CHANGE AND ECONOMIC SURVIVAL**

## **Papers:**

- VI. Kutsar D., Trumm A. (1993) Poverty among households in Estonia. *Scandinavian Journal of Social Welfare* 1993, Vol.2, No.3: 128–141.
- VII. Trumm A., Kutsar D., Oja U. (1993) Transformation process in Estonia: A Challenge for social policy. *Yearbook of Population Research in Finland*. XXXI. Helsinki: Väestöliitto, 1993: 104–110.

# Poverty among households in Estonia

Kutsar D, Trumm A. Poverty among households in Estonia.  
Scand J Soc Welfare 1993; 2: 128-141. © 1993 Munksgaard.

Estonia was occupied by the Soviet Union for 50 years. Now she has restored her independence and extensive transformation has started, creating acute social problems. The economic survival of the whole society has become a main goal. The authors examine different poverty lines using the family budget data of 239 households surveyed in May and August 1992 for comparison. The analysis reveals that, whereas the wages and expenditure are low compared with unregulated prices, the share of households living under the poverty line does not reflect the real situation. The poverty among Estonian households reveals a skewed structure of expenditure that indicates exclusion from the consumption-centered way of life. Empirical evidence is given that single-earner households and households with 3 or more children face the danger of falling into deep poverty.

**D. Kutsar, A. Trumm**

Family Research Institute, Tartu University, Estonia

Key words: poverty line; Estonia; household

Dagmar Kutsar, Family Research Institute, Tartu  
University, 2 J. Liivi St., EE-2400 Tartu, Estonia

Accepted for publication February 3, 1993

Estonia, a small country on the Baltic Sea, has attracted the attention of the world during recent years. For 50 years Estonia was occupied by the Soviet Union. The independence of Estonia was restored in 1991.

Estonia faces many problems today because she is building a new society. Coping with basic social changes and economic survival are essential tasks for many people, families and the whole country.

Poverty as a social problem is in the process of spreading at the different functional levels of the society. Estonia is forced to borrow money from other countries to reform and reconstruct the national economy and must accept humanitarian aid given by other countries.

Visitors to Estonia can see people in the streets begging for money from passers-by, which is a typical behavior in poverty accompanying times of transformation.

Some people living in Estonia feel themselves poor because they cannot practice the lifestyle and the standard of living they can see while visiting other countries. Others feel poor because they are not able to buy a car, a house or clothes of the latest fashion. But still others do not know how they can get everyday meals or how to pay for their housing: rapid changes in the society increase the probability of falling into real poverty.

Poverty as a subject of investigation is new to the authors, whereas poverty as a social problem was a taboo in Soviet society. This article discusses the various poverty lines that can be applied in analyzing living conditions in Estonia and which households fall under these lines.

## **Estonia in a historical perspective: a sociopolitical overview**

### **Historical background**

Estonia existed as an independent state from 1920 to 1940. According to the secret protocol of the Hitler-Stalin pact (signed on August 23, 1939), Estonia became a part of the Soviet Union's sphere of influence. On June 16, 1940, the USSR delivered a note to the Estonian government that included an ultimatum that a new government be appointed. On July 21, after the elections held under the control of the Red Army, the new parliament convened and proclaimed the formation of the Estonian Soviet Socialist Republic (Estonian SSR). On August 6, 1940, the Estonian SSR was incorporated into the USSR.

In 1980, 40 Estonian intellectuals wrote an open letter to draw the attention of the authorities to the unsolved ethnic problems in Estonia. This letter began the national awakening and the restoration of independence. As a result of public pressure, on November 16, 1988, the Supreme Council adopted the Declaration of Sovereignty, which acknowledged the supremacy of Estonian laws, and declared that all resources in Estonia are Estonian property. The development of events in Estonia captured more and more attention internationally.

In 1989-1990, civil society was restored: the free press developed, political parties were formed, the society became more open and free elections took place. On August 20, 1991, the Republic of Estonia was restored. The transition period terminated with the adoption of the Constitution in June 1992 and free elections of the Parliament. In September 1992 constitutional power was restored.

### Population

According to the 1989 census, Estonia has a population of 1,565,662; 1,126,900 (72%) live in urban centers. The population density is 35 per km<sup>2</sup>. Estonians constitute 62% of the population, Russians 30%, Ukrainians 3.1% and Belorussians 1.8%.

The annexation of Estonia by the USSR in 1940 – and the Second World War – had a disastrous effect on the population. As a result of mass deportation, mobilization and loss of life in the war, as well as mass emigration, the population of Estonia decreased from 1,136,000 in 1939 to 854,000 in 1945 (*The Baltic States*, 1991: 16).

From the first days of Soviet occupation, the population was affected most by the colonial assimilation policies of the USSR. Due to the high immigration rate and the low birth rate of Estonians, the population of this ancient nation is in danger of extinction.

The migration rate has started to drop in recent years but the aging of the population is continuing.

### Living standards and poverty

At the time of the independent Republic of Estonia (1920-1940), Estonia was an agrarian country with only a few large industrial enterprises. By the 1934 census, 64% of the population of working age comprised an independent part of the population that was not involved in the labor market. In Sweden the same proportion was 21% in 1930 (Kuddo, 1990: 26).

The structure of expenditure of an average working-class family was similar to that of the working-class family in other European countries – about two fifths of wages were used for food and three fifths on other consumer goods and services by the late 1930s. In the Soviet Union about 60% of the family income was spent on buying food at that time. Estonia had low food prices. The expenditure on food per day, using the currency exchange rates in the 1920s, was 3.5 times higher in France, Switzerland and Italy, 2-2.5 times higher in Norway, Sweden and Austria and 1.5 times higher in Poland and Denmark than in Estonia (Kuddo, 1990: 30).

One of the variables for comparison is the purchasing power of a person's income. For example, a male worker could buy almost 7 pairs of shoes for his monthly salary or 3 suits for 2 months' salary. Also, he could buy 7.3 food baskets according to the International Labour Bureau statistics in 1939. The same figure for Sweden was 8.6. The purchasing power and the level of salaries were considerably lower in the Soviet Union (Kuddo, 1990: 31).

Household budget surveys were carried out in 1925 and 1937-1938. Sufficient reliable information was available for everybody who was interested in the economic situation in Estonia.

Acquaintance with the available literature on the subject reveals that the problem of poverty was not acute or perhaps not a theme for open discussion. The people had stable employment and their income was not considered low. Poverty as a social problem was connected with unemployment which, as a rule, mainly had a structural, temporal and regional character. From time to time the number of jobs offered was larger than the number of registered unemployed people.

The balance of the family budget was more critical in villages in winter when there was not enough work. But in the countryside the food expenditure and housing costs were lower than in towns.

According to the family budget inventory in 1937-1938, the average income of an industrial worker's household was 121 crowns per month (Reiman, 1939a: 121). Approximately 4-5% of industrial workers' households lived below the poverty line (defined as 50% of the median income per person).

Independent Estonia continuously increased welfare and the development of democratic principles in social policy, observing European cultural traditions. The level of salaries grew 30% and purchasing power 18% from 1923 to 1938 (Pullerits, 1938: 235).

The time of Soviet occupation in Estonia may be divided into 3 stages: the post-war period, the thaw in the 1960s and the period of stagnation until the breakdown of the Soviet system.

Becoming a part of a totalitarian state in 1940, Estonia was no longer able to continue normal development. The economy was centralized under the control of Moscow; private property was nationalized with no compensation offered to the former owners. Farm life as the lifestyle of Estonians was disrupted. Domestic animals, crops and land were handed over to collective farms. Large industrial enterprises, which started to function as migration pumps, were built by decrees issued by Moscow.

Substantial differences in living standards between Estonia and the Soviet Union, the extremely unfavorable monetary reform and increasing prices had a catastrophic impact on the living standards and the welfare of the Estonian population already from the first years of Soviet power. The standard of living began to drop rapidly.

During the years of Soviet occupation, statistics were fully subordinated to Moscow's control. Information flowed only in special channels not accessible to all the people who were interested in the data. The material used by the press that appeared in the "open" publications were often presented in a form that made them hardly applicable and comparable. After the Second World War, almost everyone in Estonia was poor. All bank accounts exceeding 1000 rubles were confiscated in 1941. Extremely low salaries could not compensate for the growing prices.

## Kutsar & Trumm

Table 1. The structure of expenditure and consumption in Finland, Sweden and the USSR in 1960 (%)

Expenditure	Finland	Sweden	USSR	
			workers	collective farmers
Food	38	27	40.7	54.3
Alcohol and tobacco	9	10	4.2	3.3
Housing	19	24	2.9	-
Manufactured goods	14	13	18.0	16.3
Health care	4	4		
Health care and education	11.7	7.6		

Source: Kuddo, 1990: 37

Table 2. The structure of consumption in Finland, Sweden and Estonia in 1987 (%)

Expenditure	Finland	Sweden	Estonia
Food	36.6	18.7	40.6
Housing	18.4	25.6	7.0
Clothes and shoes	6.4	7.6	13.2
Education, culture and leisure	9.7	10.1	2.2

Source: Kuddo, 1990:40

People in collective farms had to live almost without money. Due to industrialization, the situation in towns was less difficult.

By the mid-1960s, the period of thaw, the number of poor people had decreased compared with the post-war period. The deformed economy and social policy in the USSR created a situation in which nobody considered himself or herself to be really poor, although many people lived near the poverty line. The ruling social policy of equalization did not improve of any wealthy people.

Although economic growth was satisfactory in the 1960s, considerable differences in the standard of living and welfare of Estonians appeared in comparison with Sweden and Finland. The income and consumption level of the Estonian population had dropped to the level of the year 1920; the living standards hardly ever reached the level of the late 1930s. Besides the consequences of the Second World War, the efficiency of different political and economic systems is evident (table 1).

The share of household expenditure on food was considerably larger in the 1960s than during 1920-1940. In 1960 it constituted 50% in the working-class families and 58% in the families of collective farmers.

Employment was considered honorable ideologically; at the same time, not working was condemned. For that reason everybody was guaranteed work. Unemployment as a social problem did not exist officially. Actually, invisible unemployment and underemployment did exist.

The rapid economic development of the 1960s came to the decline in the 1970s, and the economy finally stagnated. In the 1980s, Moscow controlled more than 90% of Estonian industry. Estonia's economy had fallen a great deal behind the most industrialized countries. On the whole, Estonia was still one of the leading republics in the USSR economically.

In the 1980s, the national economy reached a crisis. The demand for goods and services outstripped the supply, average prices went up and the purchasing power of the ruble decreased enormously. The ruble, not being a convertible currency, ceased to be a generally accepted means of exchange, even in domestic trade. As a consequence of the shortage of goods, the savings rate increased. At the beginning of 1990, an average savings bank account was estimated to be 1464 rubles per person. This growth in savings did not reflect any degree of prosperity; people were not able to use their incomes. In the early 1990s, fear of the forthcoming monetary reform and accelerating inflation caused panic, and people began to withdraw money from their bank accounts and hoard everyday consumer goods. The absence of normal business rules regulating the activities of cooperatives, small enterprises and the black market businesses had a destabilizing influence on the consumer goods market.

In 1979 a systematic family budget survey started but the data on incomes and expenditure of the families surveyed are more reliable from the year 1980. The administrative minimum living income was fixed and identified at the lowest level of physiological subsistence (50 rubles per family member). The families who received less (calculated from the factor income of the preceding year) had the right to an allowance. As a rule, the physiological minimum subsistence was lower than the minimum living income. At the same time, the sum of 125 rubles as a social minimum was fixed but was not used in social policy.

The investigation *Everyday life of your family*, carried out in 1989 by the Family Research Institute of Tartu University, revealed that even in 1989, 15% of the observed families with children received less than 50 rubles a month and 86% had an income below 125 rubles per family member (Trumm, 1991: 54).

In Estonia housing expenditure has been relatively low because housing costs have been largely financed by government subsidies. Low-cost, low-quality housing dominated the picture. Prices on food have been kept low with the help of state donation. Prices of consumer goods have been considerably higher because of a high sales tax (table 2).

During the period of transition (1990-1992) from a Soviet republic into an independent country, the Estonian economy has been in deep crisis. Estonia remained in the sphere of influence of the ruble and

the Soviet economy until the monetary reform took place in June 1992. The ruble suffered from growing inflation, the standard of living fell and the cost of living increased.

The currency in Estonia is the *kroon* (crown - EEK), which is connected with the German mark (DEM). The monetary reform provided more financial security for the Estonian people and enabled them to become independent from the Soviet economy.

The hyperinflation of the ruble and the Estonian monetary reform resulted in a new economic situation, and many people face the threat of living in poverty. The problem of financial survival is especially acute for retired people whose savings have been decimated by the hyperinflation of the ruble. Also, it is a problem for young families, students and families with many children. The process of social differentiation is noticeable.

The legacy of socialism and the totalitarian system of the Soviet occupation has left a serious impact on Estonian society. The breakdown of the national economy and relations with the economic system of the former Soviet Union cause great problems in production, obtaining raw materials and finding markets, which creates unemployment. Due to the colonial policy, the original Estonian population is in danger of extinction; non-Estonian immigrants have difficulty identifying themselves as a minority group and integrating into Estonian society.

People living in Estonia face an absolutely new situation, psychologically and economically. The Soviet people were used to the situation that everybody was guaranteed a job and there was always a shortage of labor. This has made people unconcerned about the

quality of work, since they never feared losing their job.

People feel suspicious about privatization because the long-term national memory has recorded a painful experience of deportation to Siberia. This suppresses people's initiative and hinders them from active participation in the transformation processes.

The life philosophy of the planned economy produces learned helplessness. Work was guaranteed for everybody; unemployment as a social problem did not threaten anybody. Although wages were not high, the living costs were not high either. State subsidies for food, housing and transport, free education and health care financed by the state and the social welfare system have all been services offered to the people without demanding money from them. People in Estonia lack the self-help mentality.

Crisis on all the levels of society makes people feel insecure and stressed. Too many great changes create problems of adaptation to new situations. The basic changes include the transition from public property into private, which makes new demands to the changing relationships, knowledge and people's whole philosophy of life. The need for retraining and refresher courses, as well as social counselling and a new social care system, is evident.

**Poverty research: Estonia in 1992**

**Changes in the standard of living**

*Cost of living and minimum living standard.* The cost of living has been calculated from the minimum living income fixed in 1989. The indexed cost of living has been the basis for the correction of the subsistence minimum, wages, social transfer payments and

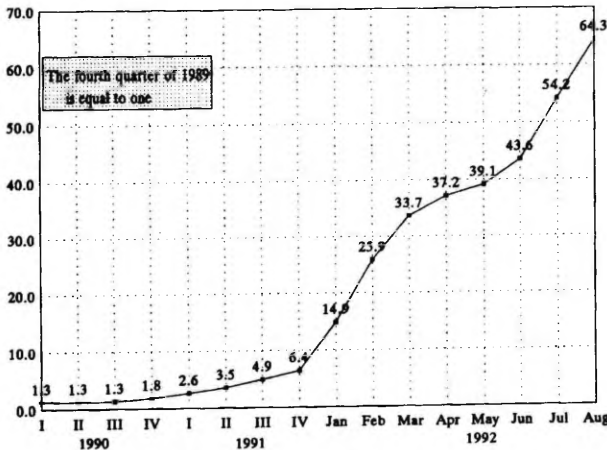


Fig. 1. The cost of living index in Estonia 1990-1992 (fourth quarter of 1989 = 1). Source: *Eesti statistika aastaraamat 1992(7)*: 29.

allowances. The minimum living income is equal to the minimum salary in the state-owned enterprises.

The cost of living and the minimum living income changed noticeably in 1992. From January to August 1992 the cost of living increased 4.32 times and the subsistence minimum 3.27 times (Fig. 1). The administrative minimum subsistence is corrected according to the changes in the cost of living, but the disproportion between these two levels is growing. Whereas all the social transfer payments, pensions, allowances and salaries of state enterprises are directly connected with the administrative subsistence minimum, many people are getting poorer.

In August one fourth of households received an income smaller than one administrative minimum income per household member. On the other hand, before the monetary reform, people invested their money in increasing their supplies of food, clothes, footwear and other consumer goods. By August the supplies began to diminish.

The index of the cost of living is not a good indicator for the correction of salaries and social transfer payments in the current situation. For this purpose, the index of the cost of living is replaced by an index of the cost of consumption, based on the average expenditure.

Income groups are formed according to the administrative minimum disposable income per family member. The Estonian Statistics Authority identifies 3 income groups: 1) less than one minimum living income per family member is the bottom income group; 2) 1-3 minimum incomes is the middle income group; and 3) more than 3 minimum incomes is the upper income group.

The middle income group decreased from 70% to 50% of the population in August. The two remaining groups have no fixed tendency; their percentages range from 6% to 30%. This tendency is connected with the changes in the political-administrative minimum subsistence (in March EEK 100 and in July EEK 200). If the administrative subsistence minimum (minimum salary) is going up, the number of households living under that line grows, as the salaries and social transfer payments will be raised afterwards.

The income structure of the households in 1992 differs greatly from the income structure of the preceding years, because of the basic structural changes in Estonian society. In the 1970s and 1980s, private individual production was not regulated by legislation and profit from private enterprise was illegal. The role of wages and salaries in the income structure has decreased considerably during more than 20 years. In recent years this is connected with privatization and expanding business, the involvement in private enterprises, stock companies and joint ventures. In addition, people were compensated for the price rise

caused by the elimination of state subsidies on consumer goods. In 1970, the proportion of wages and salaries as a proportion of national income was almost 80%, in 1989 69.4%, and in August 1992 it fell to 40% (*Eesti statistika aastaraamat*, 1991: 256).

In the lowest income group, compensation and allowances comprise the major part of income; the upper income group receives more from the production of goods and services and they also receive income in hard currency more often.

*Unemployment.* The gross output of production was halved, prices increased 13 times and the standard of living fell by two thirds from January to October 1992. Many enterprises have actually gone bankrupt and function only because a law on bankruptcy has not yet been implemented. People have to take forced vacations and be satisfied with very low incomes. It is often more profitable for the enterprise to pay for the forced vacation than to continue production, pay a normal salary, heat working rooms, etc. Many people have been made redundant.

There are no data available about the real level of underemployment and unemployment. By rough estimation, 58,000 people were unemployed in Estonia at the beginning of August 1992. By September 1, 1992, 7560 people received unemployment benefit. This is only a few of the people seeking work or currently not working. Men constituted 48% of all the registered unemployed; the percentage of those under 25 years of age unemployed was 23%, and for those over 50 years, 13%. Based on the prognosis made in mid-November, most state enterprises will go bankrupt or will stop production by the end of 1992. The unemployment rate will grow by 15% every month. Besides unemployment, a problem of providing social guarantees to unemployed people arises.

Unemployment puts the work force of the industrial enterprises built by Moscow's decree and mainly staffed by immigrant (mostly Russian) workers in a special situation. Even if they have high qualifications they cannot find jobs in accordance with their specialties because the former factories and plants will have a new profile suiting the Estonian economy. Very often they cannot speak Estonian. The reason for closing down these enterprises is the lack of raw materials and markets. Some outsiders who do not know the real background blame Estonians for discriminating against non-Estonian people. The general sociopolitical principle remains the same as during the pre-war independence: the task of the state is to support disabled people who cannot work; the state does not take the responsibility of guaranteeing a minimum standard of living to everyone. For that reason the transfer payment for a registered unemployed person was reduced from 80% of the minimum living income to 60% in October 1992.

Table 3. The distribution of households surveyed by type

Household type	Number of households	%
Two-parent nuclear family	94	39.3
Single-parent nuclear family	17	7.1
Two-parent extended family	14	5.9
Extended single-parent family	11	4.6
Guardian family <sup>a</sup>	4	1.7
Extended family without children	32	13.4
Two-adult household	39	16.3
One-person household	28	11.7
<b>Total</b>	<b>239</b>	<b>100.0</b>

<sup>a</sup> A guardian is an adult (a grandparent or other relative, etc.) who takes care of a child or children; adopted children have the same status as biological children

Table 4. Number of children according to household type surveyed

Household type	Number of children (%)				Total
	1	2	3	4 < (n)	
Two-parent nuclear family	23.4	52.1	17.0	7.4	94
Single-parent nuclear family	70.6	17.7	5.9	5.9	17
Two-parent extended family	57.1	28.6	7.1	7.1	14
Single-parent extended family	45.5	27.3	9.1	18.2	11
Guardian family	75.0	25.0	0.0	0.0	4
<b>Total (n)</b>	<b>50</b>	<b>60</b>	<b>19</b>	<b>11</b>	<b>140</b>
<b>(%)</b>	<b>35.7</b>	<b>42.9</b>	<b>13.6</b>	<b>7.9</b>	<b>100.0</b>

### Poverty analysis: household survey in May and August 1992

#### The sample

In 1991 the Institute of Family Research at Tartu University developed the method of family budgets in close cooperation with the joint stock company EMOR Ltd. The sample of 1023 households is divided into 3 groups and every group is involved in the household monitoring every 3 months, or 4 times a year. The sample is corrected every quarter and renewed every year. The data are collected by EMOR Ltd. and turned over to the Estonian Statistics Authority.

We will analyze the data about the household group surveyed in May and August 1992. In May the group consisted of 313 households. In August 76 households refused to be interviewed and 31 new households joined the sample. Altogether, in August the number of households participating in the survey was 270 and those questioned twice were 239 (participation rate 76%). The household is defined as people living together who have a joint budget. An adult member of the household as a contact person in the survey writes down all the income and expenditure in the household for each day during 1 month.

The most common family type in Estonia is the nuclear family (Table 3). It is the most preferred type of a household for couples as well. Although young

couples try to live separately from their parents, very often it is not possible. Obtaining housing has been a big problem for many families. In our sample, extended families constitute 24% of the households.

Single-parent households are all headed by women. They are single or divorced mothers with 1 or more children. Two adults living together include couples without children or whose children have grown up and left home. Of the one-person households, 70% are retired people and the rest are of working age. Altogether, 28% of the sample are households without children.

Estonia has a tradition of a small family. The birth rate has been low and it is continuing to fall. The two-children nuclear family is a majority of the sample (Table 4). This type of household also prevails in Estonia. The average number of children per household is 2.1, which is close to the average number of children.

In the further analysis, the guardian family is included in the single-parent group because this type of household is not numerous in Estonia and currently the group is too small for statistical analysis. The preliminary analysis revealed that there were no substantial differences in the income level per family member between the nuclear and the extended household type. The extended family groups will be included in the corresponding nuclear family types.

Of all the households surveyed, Estonian was the language of communication at home for 79%.

#### Identification of poverty

Traditionally, a poor person is a person who has little money. But little money for what? And how poor is poor? Hannu Uusitalo defines poverty as severe material deprivation due to the lack of financial resources (Uusitalo, 1992: 11).

To define common criteria for poverty, various guidelines have been elaborated; all of them refer to the resources that the specific society has or how big the average consumption of a person could be. The average and minimum level of consumption depends on the wealth of the society, the level of its development and the standard of living of the society where a person happens to live. We can define and differentiate countries as poor and rich, industrialized and developing, welfare states, welfare societies, societies in crisis, etc. In conclusion, we can speak only of relative poverty vs relative prosperity, that is, in comparison with somebody or something (in comparison with other people, households, families, countries, etc.).

The measurement of poverty may proceed from the pyramid of needs by Maslow. Then absolutely poor people cannot satisfy their physiological needs and poor people cannot satisfy their main needs because they lack financial resources. It is understand-

able that need is not a very clear criterion; it is equally difficult to say which kind of person is absolutely poor. It is more difficult to have an overview of consumption than to register incomes. Therefore, the financial resources (incomes) limit consumption; one can consume as much as one's resources allow. In this case poverty could be defined as a situation in which the resources are smaller than the consumption. Then the key variable is income. Some authors do not support such an approach. They proceed from consumption, not from income (Abrahamson, 1992; Mack & Lanslay, 1985).

In different countries the criterion of poverty is closely connected with allowances (Marklund, 1990). The same situation is also true of Estonia, where allowances are connected with the minimum subsistence (minimum expected consumption). In 1908 Georg Simmel stated: "Sociologically speaking it is not the lack of resources which defines a poor person. A poor person is someone who because of such scarcities receives public support or should receive public support according to existing social norms" (from Marklund, 1990: 126). Therefore, the term poverty has a political as well as a normative meaning. Veli-Matti Ritakallio (1991: 160) adds: "Poverty appears as its most typical in the form of restricted opportunities for consumption and the accompanying sense of deprivation. Poverty thus makes its appearance primarily as exclusion from consumption-centered way of life". Jorma Sipilä (1992: 13) asks: "Is poverty lack of financial resources, deprivation, or exclusion?"

In conclusion, the meaning as well as the measures of poverty are by no means universally accepted, and there is an international debate with two different lines:

- Poverty is determined empirically by the minimum needs of a person as a minimum subsistence level (subsistence poverty or absolute poverty); usually the distribution of incomes is investigated.
- Poverty is connected with the way of life of the concrete society as relative poverty, social and material deprivation (Townsend, 1987; Ringen, 1987; Heikkilä, 1991; Ritakallio, 1991); often deprivation indices are used.

A question still remains as to whether two notions of poverty, theoretically identified and practically measured, coincide.

Where should the poverty line be set?

To determine how many and what kind of households live under the poverty line in Estonia, the first task is to determine the poverty line.

*A line differentiating families for sociopolitical and administrative decisions.* In Estonia the administrative

minimum living income has been calculated based on the (theoretical) minimum consumption. It has been equal to the minimum salary level for all the working population. Now it is valid for all the people working in state enterprises and organizations.

As the term poverty was not used, there has not been any need to draw a poverty line. In fact, the minimum living income functions as a political-administrative poverty line because the social transfer payments have been and still are regulated in accordance with the administrative minimum living income.

The factor income per person in the family has been the main indicator for sociopolitical decisions. Since the taxes have been extremely low, the factor income has been a rather reasonable point of departure. Now the tax rates are rising rapidly and after-tax income would be more appropriate. The administrative minimum living income is revised every quarter because of the rapid increase in the cost of living. Since the cost of living increases continuously and incomes are regulated only 4 times per year, the number of households living under the fixed political-administrative subsistence minimum depends on the time.

*Poverty line at 50% of the median disposable (after-tax) income.* In Scandinavia and in the countries of the European Community the poverty line is usually set at 50% of the median disposable income per household. It is not a flexible indicator of relative poverty, but it does reflect real poverty, that is, the actual lack of material resources and unmet needs. The relativity of this poverty line can be assessed if it is connected with the purchasing power of money in a country and the proportion of consumption that is necessary for survival.

The consumption units are determined using different consumption unit scales. This provides the opportunity to reduce full households into consumption units. Several ways are used:

- The family income or the estimated consumption is divided by the number of family members. This removes the effect of family size and its structure and is mainly meant for the nuclear families with children; cohabitation is not taken into consideration. This method was used in the Estonian SSR and is still in use.
- The concept of consumption unit used by the Organisation for Economic Co-operation and Development (OECD) is based on the assumption of cohabitation (household). The first adult has a value of 1.0, other adults 0.7 each and children 0.5 each (Uusitalo, 1992: 17). This method enables international comparisons of how many and what kind of households have an income per consump-

Table 5. Consumption unit scale applied in Estonia before 1940

Age (years)	Males	Males or females	Females
0-1		0.2	
2-3		0.3	
4-5		0.4	
6-7		0.5	
8-9		0.6	
10-11		0.7	
12-13		0.8	
14-59	1.0		0.8
≥ 60		0.8	

Source: Reiman, 1939a: 118

Table 6. Poverty lines (in EEK) defined as 50% of the median income and 50% of the median expenditure calculated per person and by OECD

	Median per person		Median by OECD	
	May	August	May	August
Median income	217.4	271.2	273.9	378.4
Poverty line	108.7	135.6	137.0	189.2
Median expenditure	210.3	319.6	271.5	424.9
Poverty line	105.1	159.8	135.8	212.4

tion unit under 50% of median income in each country.

- The investigation of family budgets carried out in Estonia in 1937-1938 followed the internationally accepted consumption unit scale that was elaborated in 1932 (Reiman, 1939b: 118); the consumption units were valued according to the age of each person (Table 5).

The last consumption unit scale follows mainly the expenditure on food; the consumption of children is underestimated and cohabitation is not taken into consideration.

The approach of Hungarian scholars (Bojarskij, 1974: 164) is most interesting. They use the consumer's age and expect that, at some ages, people have an especially high consumption (the value on the consumption unit scale is more than 1.0).

The literature shows several other consumption unit scales. It is not necessary to present all of them here. We agree that every household member has a somewhat different consumption capacity based on his or her sex, age, needs, preferences, etc. The problem is which value should specifically be attributed. The consumption of a household is smaller than the total consumption of the same persons living separately would be.

*Poverty line set at 50% of the median consumption.* According to the poverty specialists of the European Community, poor households consume less than half of the median consumption (Eurostat, 1990). This method sets the poverty line based on expenditure and the consumption unit scales applied. From

August 1992 the wages and social transfers are corrected based on the median consumption in Estonia (before 1992 the calculation took minimum consumption into consideration).

*Poverty line identified through expenditure on food.* The poverty index in the United States is estimated on the basis of the cost of the food considered to be necessary for families of different composition (Ringen, 1987: 125). The poverty line is defined as the level at which 44% of all expenditure is on food (Zimmerman & Chilman, 1988 :107).

#### Different poverty lines in comparison

Two fundamentally different ways of defining the poverty line have been presented. The problem is to decide how to set the poverty line for the further analysis of the observed households.

The poverty lines that are calculated based on income follow the formula (Uusitalo, 1992: 20).

#### Factor income

- + Public sector transfer payments
- = Gross income
- Income taxes
- = Disposable income

Estonia belonged to the ruble zone in May 1992. To unify the data, all the calculations are converted into EEK at the official exchange rate of the monetary reform (1 EEK equal to 10 rubles).

Household income grew about 20% and consumption about 40% from May to August 1992 (Table 6). The political-administrative poverty line (in May EEK 100 and in August EEK 200 as minimum subsistence income and minimum wage) was almost the same as the poverty line calculated per household member but considerably lower than the poverty line calculated by the OECD.

Fig. 2 and 3 show the poverty lines of 50% of the median disposable income and 50% median of the consumption calculated per person and by OECD in August. The poverty lines are presented together with 50% of the median disposable income and the expenditure of every household type observed and the number of children in the household.

The OECD method of calculating of the poverty line finds more households without children under the poverty line, which is more appropriate in countries in which the common expenditure of the household form a considerable percentage of the whole consumption of the household. The poverty line calculated from the disposable income per person finds that more families with children are in poverty. This works especially in Estonia, because the monthly

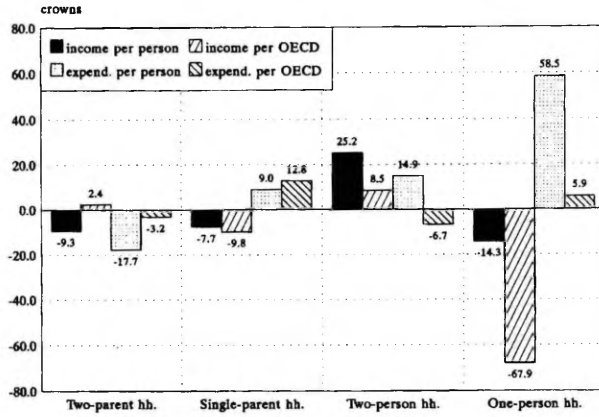


Fig. 2. Distance of 50% of the median income and expenditure per person and per OECD consumption unit from the poverty line in August 1992 according to household type (EEK).

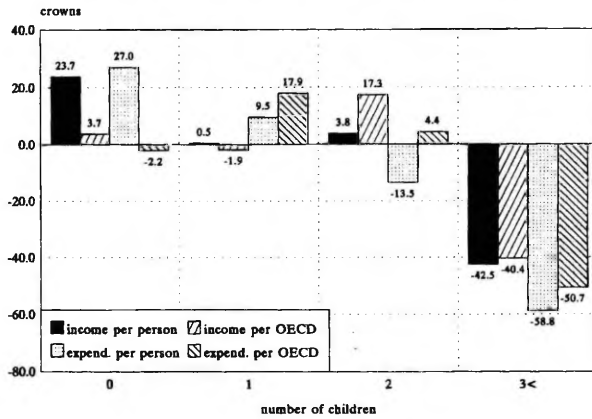


Fig. 3. Distance of 50% of the median income and expenditure per person and per OECD consumption unit from the poverty line in August 1992 according to the number of children. (EEK)

compensation (60% of the minimum wage in August) is paid to each child. Currently, the families living under the minimum living income per person cannot get any other allowance because the state lacks money.

The incomes and expenditure of the observed households (Fig. 4) are consistently contradictory. Some households whose income is under the poverty line spend more than 3 times as much, and some households spending less than 50% of the median expenditure level actually receive an income that exceeds the poverty line. Which of them is living in real need? And who would have a right to get allowances? A poverty line can be set and the number or percentage of households living under that line can be calculated to compare between countries. But are the policy-makers right if they give allowances to the

households while knowing nothing more about the household other than income or consumption and the household composition?

The calculation of poverty lines from the household factor or disposable income creates some doubts about the reliability of the results (Fig. 4):

- People in Estonia have not got used to reporting their incomes unless they need to apply for additional financial support, getting an allowance, etc.
- Some respondents do not register all the income that they receive (money that has been paid for extra work, from a black-market business, etc.).
- Income calculations in Estonia are based on factor income, which blurs the real picture of the available resources.

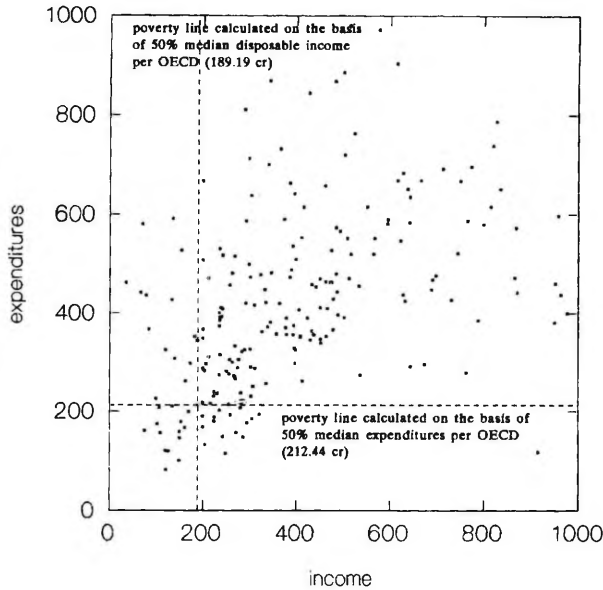


Fig. 4. The distribution of income and expenditure of households (EEK).

Based on expenditure, there are some good methods of getting more reliable statistics:

- People do not have any reason to report their expenditure as being less than it really is; calculating the poverty line based on expenditure would therefore probably give a more accurate picture.
- If reported expenditure is higher than reported income, either the reported income is too low or the household uses their savings or makes loans, and thus they cannot get out of poverty when the reserves are finished.

The expenditure of household do not reflect the real situation if:

- consumption that is free of charge to the household (such as food from allotment gardens) comprises a substantial portion of consumption; or
- the household lives from using or selling supplies hoarded before the monetary reform rapidly inflated the ruble.

Who lives under the poverty line?

The percentage of households who live under the poverty line increased considerably from May to August 1992. The whole society has moved towards a tighter budget.

The administratively fixed minimum living income

(poverty line) identified 8% of the households surveyed in May (Table 7). In August the number reached one quarter of all the surveyed households. The administratively fixed minimum subsistence income was set higher than the other poverty lines in August.

About two thirds of all households in Estonia have a nonprofit allotment garden and grow vegetables and fruits for their own consumption (Trumm, 1991: 46). In August the percentage of free consumption was hypothetically higher than in May, when almost all the food prepared for winter had been eaten. Unfortunately, the data about free consumption from the current family surveys are not available to the authors.

The data about real unemployment are not available and, unfortunately, we cannot calculate the impact of unemployment on the standard of living of the households. All we can say is that, in about one third of households with children, one or both unemployed spouses stayed at home temporarily or per-

Table 7. Distribution of households living under the poverty lines (50% of the median income) calculated from the household disposable income and expenditure per household member and per consumption unit by OECD (%)

Poverty line	Per person		By OECD		By minimum income	
	May	August	May	August	May	August
Income	8.8	12.6	6.7	13.0	8.4	26.0
Expenditure	8.4	13.8	8.4	13.0	7.5	20.1

**Kutsar & Trumm**

Table 8. Distribution of households who live under the poverty line defined as 50% of the median expenditure per person, by OECD and calculated using the minimum living income in May and August 1992 (%)

Households living under the poverty line	Poverty line calculated based on expenditure		Calculated based on the minimum income <sup>a</sup>			
	Per person		By OECD			
	May	August	May	August	May	August
Two-parent household	10.2	19.4	7.4	16.7	8.3	29.6
Single-parent household	21.9	25.0	21.9	18.8	21.9	28.1
Two-person household	0.0	4.2	2.8	5.6	0.0	7.0
One-person household	6.7	3.3	10.0	6.7	7.1	7.1
Total (%)	8.4	13.8	8.4	13.0	7.5	20.9

*n* = 239

The minimum living income was EEK 100 in May and EEK 200 in August

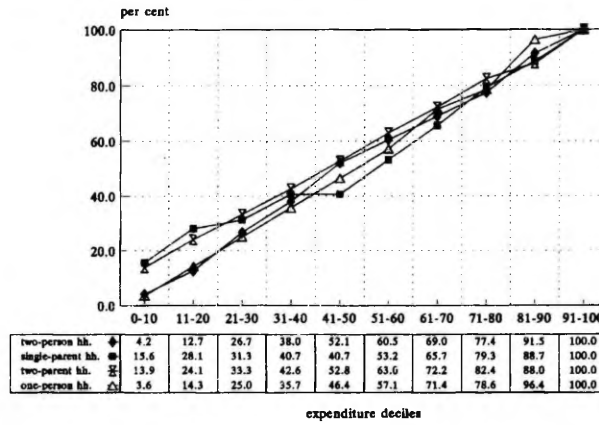


Fig. 5. The distribution of households in expenditure deciles according to household type in August 1992(%).

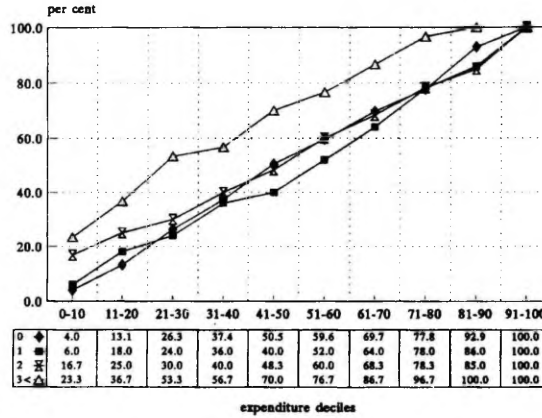


Fig. 6. The distribution of households in expenditure deciles according to number of children in August 1992(%).

Table 9. Distribution of households according to the number of children who live under the poverty line defined as 50% of the median expenditure per household member, by OECD, and calculated from the minimum living income in May and August 1992 (%)

Number of children	Poverty line calculated based on expenditure				Calculated based on the minimum income <sup>a</sup>	
	Per person		By OECD		May	August
	May	August	May	August		
0	2.0	4.0	5.1	6.1	2.0	7.1
1	8.0	10.5	8.0	10.0	8.0	18.0
2	10.0	25.0	8.3	20.0	8.3	28.3
3	26.7	30.0	20.0	23.3	23.3	50.0
Total (%)	8.4	13.8	8.4	13.0	7.5	20.9
<i>n</i> = 239						

<sup>a</sup> The minimum living income was EEK 100 in May and EEK 200 in August

manently (had maternity leave, looked for a new job or had lost a job); the fact that one of the spouses was not currently working might be significant. By household type, the single-parent family was in the highest risk of poverty in August 1992. About one quarter of the single-parent households lived under the poverty line (Table 8). The difference between the percentage of single-parent and two-parent households who lived under the poverty line was not very large. The households in which one of the spouses did not work (if, for example, the mother had maternity leave) did not differ financially from a single-parent household; both are households with one breadwinner.

Of the single-parent families surveyed in August, 16% were situated in the lowest decile of expenditure of the single-parent households; about 30% were situated in the bottom 25% (Fig. 5). A two-person household without children is in the best situation. Only about 4% of these households are in the lowest decile of expenditure in their household group.

The position of a household on the scale of expenditure depends on the number of children (Table 9, Fig. 6). The critical factor for the household's financial status is a third child and each child thereafter. Already 70% of the households with 3 or more children are in the bottom 50% of household expenditure. Therefore, the compensation and possible allowances cannot guarantee normal financial status for the families with many children (Fig. 3). The situation is the worst if a single parent happens to have 3 or more children or if one of the parents is not employed.

The grouping of households by expenditure demonstrates disparities in living standards. The differences in expenditure are about 9.5 times between the households situated in the first and the last decile. Consequently, the household groups with low, average and high expenditure have a different expenditure structure and can therefore develop different ways of living.

### Consumption structure

The households in Estonia have a skewed structure of consumption (Fig. 7; data from August 1992). Almost all the households (except for the upper decile) have a similar consumption structure. More than half of all expenditure is for food, about 10% for housing, less than 10% for clothes, shoes, etc. and almost nothing for other needs such as durable goods, transport, education, leisure, health and travel. The expenditure on housing were not yet very high at that time because the heating period had not started and the prices of gas and electricity had not yet been increased. Surprisingly, almost nothing was spent on consumer goods. It is interesting that even the upper decile of the expenditure groups did not notably spend much on wardrobe.

In October 1992, when the heating period started, the expenditure on housing grew rapidly because Estonia had to buy fuel at world market prices. This has made many households insolvent and has forced them into poverty, especially at the time of the administratively fixed heating period (from October to May).

If household can reduce expenditure on food, more can be spent on other goods and services: more opportunities to make choices and to develop and follow their customary way of life (Fig. 7).

### Poverty or exclusion?

Ringen (1987: 134) states: "Poverty in terms of how people live is not the same as poverty of low resources." The identification of poverty on a large scale used by Ringen (1987: 126) can be instructive: if a person who has a color television set, a car or a decent apartment now has to spend more than half of all income on food, can no longer use a car because of expensive petrol, cannot habitually go to the café, cannot buy any new book that he would like to and cannot replace an old refrigerator with a new one,

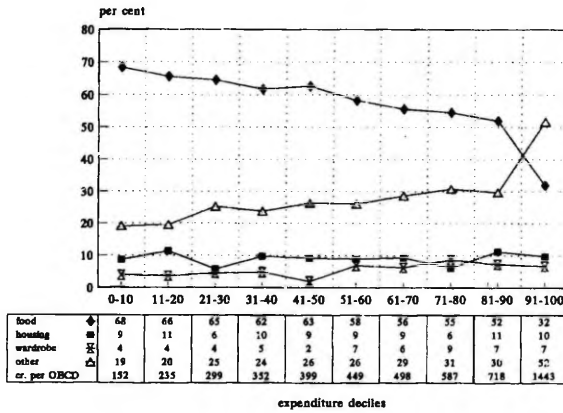


Fig. 7. The structure of expenditure in expenditure deciles in August 1992(%).

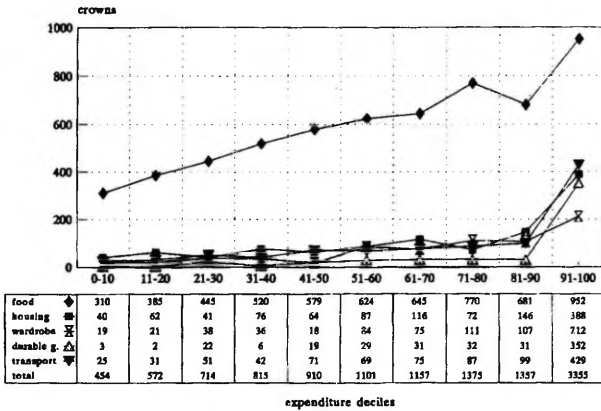


Fig. 8. Absolute consumption in expenditure deciles in August 1992 (EEK).

then what is the effect on this person's lifestyle? He or she has to give up the customary way of life because of changes in society and his or her own new financial situation. A desire to restore the former customary way of life develops a feeling of being excluded from customs and traditions, that is, from the former lifestyle.

Young people, including those with children, who are just starting their independent life separately from their parents face a more serious situation. The people who have already furnished their homes do not need new durable goods as much as young families do. It is as if there is an imaginary starting line for people in Estonia and the households occupy their places for further life, but those who have settled down and have their own homes earlier have a more favorable starting position – even if they are not able

to develop their household resources because of high prices today. Such a situation precludes normal development and the growth of the household, especially in young families. As a result, the birth rate has decreased drastically in recent years in Estonia and people feel distressed.

The households in the highest decile by expenditure only use one third all expenditure on food, but in absolute terms (EEK) they pay about 3 times more for food than the lowest tenth (EEK 310 and 952 respectively in August) (Fig. 8). The lowest decile has a very low daily budget: on average EEK 3 per person on food, a bit more than EEK 1 on housing, EEK 0.80 cents on transport, etc. This means that the households in the lowest decile of expenditure have severe constraints on what, where, and how much to buy. They cannot eat outside the home, can-

not buy sweets, if they have a car they cannot buy petrol, i.e. use their own car; expenditure on recreation and durable goods is precluded because they do not have any savings left. Often they are households with 3 or more children (the percentage spent on food up to 70% of total expenditure) and the households with one wage-earner. Are they really poor? A mother wrote to a local daily newspaper in 1992 (*Postimes*) that she had 3 children aged 9, 7 and 1, and each received an allowance of EEK 60 monthly. She was on maternity leave and received EEK 90 monthly. Her husband's disposable income was 1.5 times the minimum wage. Her concern was that she was not able to buy food that satisfies the nutritional requirements for her children. But this does not mean starvation. The woman cannot guarantee the emotional and mental welfare of her children: cannot pay for their hobbies, she has no money for movies, theater or books. Such a situation makes her distressed and for that reason she is not able to have a normal emotional atmosphere at home. She demands that the state help her and others like her.

The absolute expenditure (in EEK) of the households reveals disparities in the standard of living. The households with a lower standard of living and low income have to adapt their way of life to their meager income. The households with higher living standards aspire to develop a way of life that requires more money and would conform to their financial and social position.

Taking into consideration low income and different lifestyles, all the households spending more than 50% of all their expenditure on food are more or less excluded from the normal consumption-centered way of life. Those who have more resources but are not able to continue their customary way of life are excluded from their earlier standard of living and have problems with coping with the new situation. Those who are just establishing their own homes have difficulties in furnishing them. Almost all of the surveyed households have spent almost nothing on consumer goods because of low income and relatively high prices. Only the households in the top decile may feel less excluded from the consumption opportunities offered by society (Fig. 8).

In conclusion, due to privatization, the changing structure of property ownership and the reorientation of the economy from the eastern market to the western is creating a severe economic crisis and reducing production, which in turn results in extremely low wages. At the time when prices are approaching the world market level and wages remain significantly lower than the average in Europe, most households cannot maintain their normal consumption behavior. Defining the poverty line as 50% of median income or 50% of median expenditure is not that different, as everybody can spend what they have. Since

wages are low, the relative poverty line is also low. In Estonia the structure of total expenditure and the percentage spent on food would be better points of departure for international comparison and more appropriate indicators of relative poverty.

## References

- Abrahamson P (1992). Poverty and welfare in Denmark. *Scandinavian Journal of Social Welfare* 1: 20-27.
- The Baltic States A reference book* (1991). Tallinn, Riga, Vilnius, Estonian, Latvian and Lithuanian Encyclopaedia Publishers.
- Bojarskij A, ed. (1974). *Kurs demograafia* [Course of demography]. Moscow, Statistika.
- Eesti statistika aastaraamat* [Statistical yearbook of Estonia] (1991). Tallinn, Estonian Statistics Authority.
- Eurostat (1990) *Rapid reports. Population and social conditions*. Luxembourg, Publications Office of the European Communities, 1990, 7.
- Heikkilä M (1991). Poverty and accumulation of welfare deficits. In: Lehto J, ed. *Deprivation, social welfare and expertise*. Helsinki, National Agency for Welfare and Health, pp. 33-47 (Research Reports 7).
- Kuddo A (1990). Rahvastiku sotsiaalne areng Eestis (rahvusvaheline võrdlus). 1930-1980. aastad [Social development of the Estonian population in 1930-1980 (international comparison)]. In: *Eesti Vabariigi suhted Nõukogude Liiduga. Eesti sotsiaalne areng 1930-1980. aastatel*. Tartu, Eestimaa Rahvarinde väljaanne, pp. 26-46.
- Mack J, Lanslay S (1985). *Poor Britain*. London, George Allen & Unwin.
- Marklund S (1990). The structures of modern poverty. *Acta Sociologica* 33: 125-140.
- Pullerits A, ed. (1938) *Eesti. 20 aastat iseseisvust* [Estonia. 20 years of independence]. Tallinn, Varraku Kirjastus.
- Reiman H (1939a). 1937.-38. aasta büdžetiuringu organisatsioon [Organization of the household budget inventory in 1938-1939]. *Eesti Statistika Kuukiri* 208(3): 117-118.
- Reiman H (1939b). Tööstustöölise leibkondade büdžetid [The budgets of the industrial workers' households]. *Eesti Statistika Kuukiri* 208(3): 119-146.
- Ringen S (1987). Poverty in the welfare state? In: Erikson R et al., ed. *The Scandinavian model. Welfare states and welfare research*. London, M.E. Sharpe, pp. 122-138.
- Ritakallio V-M (1991). *Köyhyy ei tule yksin* [Poverty does not come alone]. Sosiaali- ja terveystalitus tutkimuksia, II. Helsinki, National Agency for Welfare and Health.
- Sipilä, J. (1992). Defining, measuring and talking about poverty: the case of Finland. *Scandinavian Journal of Social Welfare* 1: 12-19.
- Townsend P (1987). Conceptualizing poverty. In: Ferge Z, Miller SM, ed. *Dynamics of deprivation*. London, Gower Publishing.
- Trumm A (1990). The living conditions and income of the families in Estonia. In: *Estonian population and the family. Family problems* 10. Tartu, Tartu University, 43-59.
- Trumm A (1991). *Riskiperede elamistingimused ja isiklik majapidamine* [The living conditions and everyday life of the families in economic risk]. Tartu, Tartu University.
- Uusitalo H (1992). *The Scandinavian welfare state and poverty*. Themes, 4. Helsinki, National Agency for Welfare and Health.
- Yearbook of Nordic Statistics* (1991). Stockholm, Nordic Council of Ministers.
- Zimmerman SL, Chilman CS (1988). Poverty and families. In: Chilman CS et al., ed. *Employment and economic problems*. London, Sage Publications, pp. 107-123 (Families in Trouble Series, Vol 1).

## Transformation Process in Estonia: A Challenge for Social Policy

**AVO TRUMM**

Research Associate  
Unit of Family Research  
Tartu University, Estonia

**DAGMAR KUTSAR**

Research Associate  
Unit of Family Research  
Tartu University, Estonia

**URMAS OJA**

Research Associate  
Unit of Family Research  
Tartu University, Estonia

### **Abstract**

The aim of this study is to analyze the new economic situation households have to face in Estonia and to discuss the new tasks and responsibilities of social policy in this new situation. The data used are based on a sample of 419 households monitored in January 1993.

The study reveals that low income and unequal income distribution is characteristic of today's Estonia. The average salary of households has continuously increased but the increase has all the time been lower than that of the cost of living.

The article discusses the new socio-political tasks and responsibilities. The main task is to reach the optimal balance of limited resources between economic development and social expenditures. The state has to support disabled people who cannot work but it cannot take the responsibility of guaranteeing a minimum of living for everyone.

**Keywords:** households, income, social policy, Estonia

“Changing the entire political, economic and social system in a society is difficult. And if the changes are to be brought about simultaneously, the situation becomes nearly insoluble” (Dellenbrant 1993, 154).

Estonia restored independence after fifty years of the Soviet occupation in 1991. Now, building a new society, she faces deep crisis in all spheres of the society. Coping with multiple social change and economic survival are essential tasks for many people, families and the whole country.

The collapse of the Soviet order brought to an end not only a particular type of a political and economic system, but a particular type of welfare state. New social phenomena such as unemployment, inequality and poverty have found a fertile soil in Estonia. The new socio-political and economic conditions set new tasks, create new dilemmas and challenge for socio-politicians.

The transformation and its consequences in Eastern Europe have great importance for those involved in this process as well as for the developed western countries. The different aspects of reformation are discussed at numerous political meetings and presented at scientific conferences. Several articles are published on this issue by the eastern and western scholars (Deacon 1992, Marklund 1993, Dellenbrant 1993, Ferge and Kolberg 1992, Marody 1992). The barriers of transformation have been in the focus and the negative scenarios are outlined (Dellenbrant 1993).

The aim of the present study is dual:

- 1) to analyze the new situation people in Estonia have to meet focusing on the economic situation of households;
- 2) to discuss new tasks and responsibilities of social policy in a changed situation.

### **Data and method**

In 1991 the method of household budgets was developed by the Unit of Family Research at Tartu University in close cooperation with the joint stock company "EMOR". The sample of 2000 households is divided into three groups and every group is involved in the household monitoring once in three months, i.e. four times a year. The sample is corrected every quarter and renewed every year. The data are collected by EMOR Ltd. and handed over to the Estonian Statistics Authority.

Currently the data about 419 households monitored in January 1993 will be analyzed.

### *Concept of household*

The household is identified by the persons living together and having a joint budget. An adult member of the household as a contact person in the survey writes down all the incomes and expenditures the household makes every day during one month.

### *Concept of household disposable equivalent income*

Household income is a sum of incomes of individual members, transfers and services that a household receives. The concept of disposable income is of central significance in the analysis of household economic welfare. Calculation of disposable income follows a scheme that is exposed by Hannu Uusitalo (1992, 20)

Factor income  
+ Received public sector transfers  
= Gross income  
- Income taxes  
= Disposable income

Economic welfare is dependent on the size and structure of the household. For elimination this impact the method of consumption units is needed. The consumption unit is determined using the OECD scale. It is internationally widely used authoritative ex-

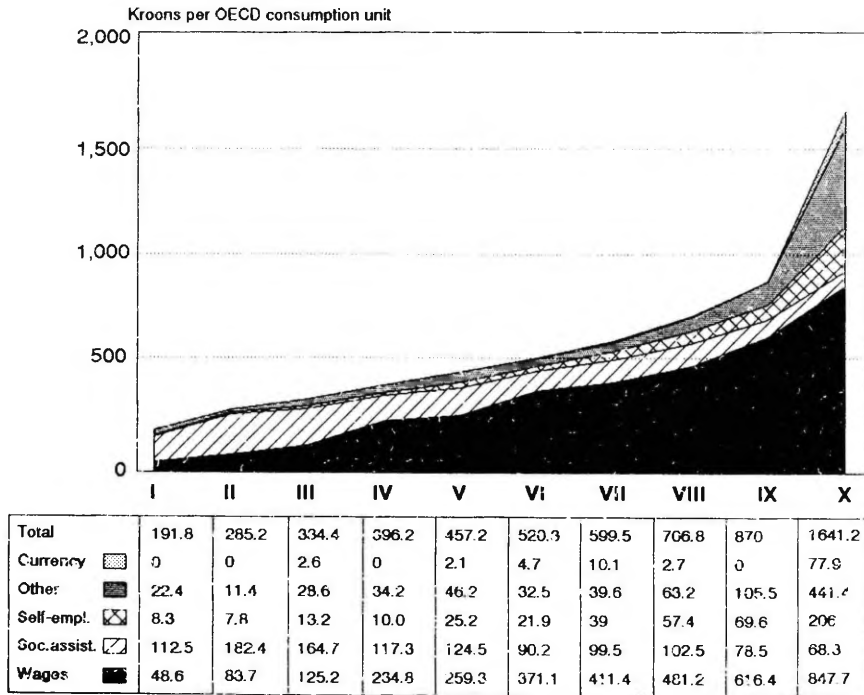
ample of the result of the expert method and gives an opportunity to reduce full households into consumption units. OECD concept of consumption unit (equivalence scale) proceeds from the fact of cohabitation (household). The first adult has a value 1.0, other adults 0.7 and children 0.5 (Uusitalo 1992, 17). Disposable income calculated on the basis of OECD equivalence scale forms household disposable equivalent income.

**Analysis**

*The income distribution of the households*

Low income and its unequal distribution is characteristic of today's Estonia. In January 1993 in about two thirds of monitored households the disposable income per consumption unit was less than two minimum wages, i.e. less than EEK 600. The average salary of households has continuously increased (in January 1993 the average salary was EEK 755, in June EEK 1,080), but all the time it has been lower than the increase of the cost of living. Compared with the salaries in July 1992 the real salary in June 1993 forms 94.5%. Figure 1 illustrates the distribution of income and the structure of the income in different income groups in January 1993. The income share of the total income distribution in the lowest decile forms 3.1% (the last 27.3%). (1 USD = ca 13 EEK in 1993)

Figure 1. The structure of disposable household income per OECD consumption unit in income deciles in January 1993.



Household deciles are calculated on the basis of disposable income per OECD

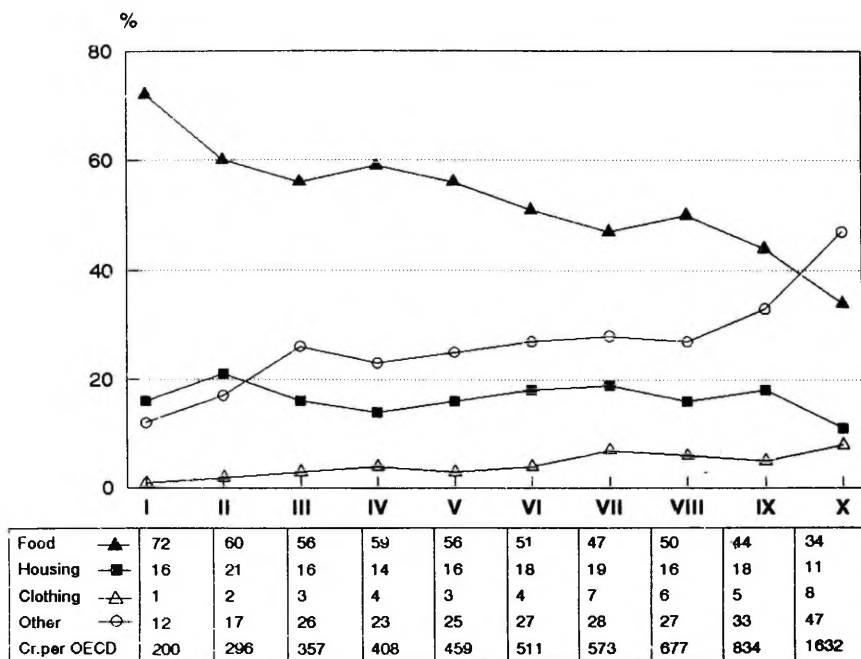
The income structure in the upper and the lower deciles differs markedly. In the bottom income groups, compensations and allowances occupy the major part, the upper income groups receive more from property, from the production of goods and services (Figure 1). Those are the people who are doing well: they have initiative, they are successful and they know how to control the situation. Their resources are their age, ability to develop and look for new perspectives. The lower income groups are dependent on social transfers and they have problems of economic survival. Proceeding from the income structure they have low enterprising spirit and ability to cope with rapid changes. Those are mainly the people in retirement age, single parents, the unemployed and families with many children.

### Consumption structure

The grouping of households by the amount of expenditure gives evidence of existing different levels of economic welfare. The differences in the amount of expenditure are about eight times between the households which are situated in the first and the last decile (Figure 2). Consequently, the household groups with modest expenditures, average and high level of expenditure have a different expenditure structure (Figure 3).

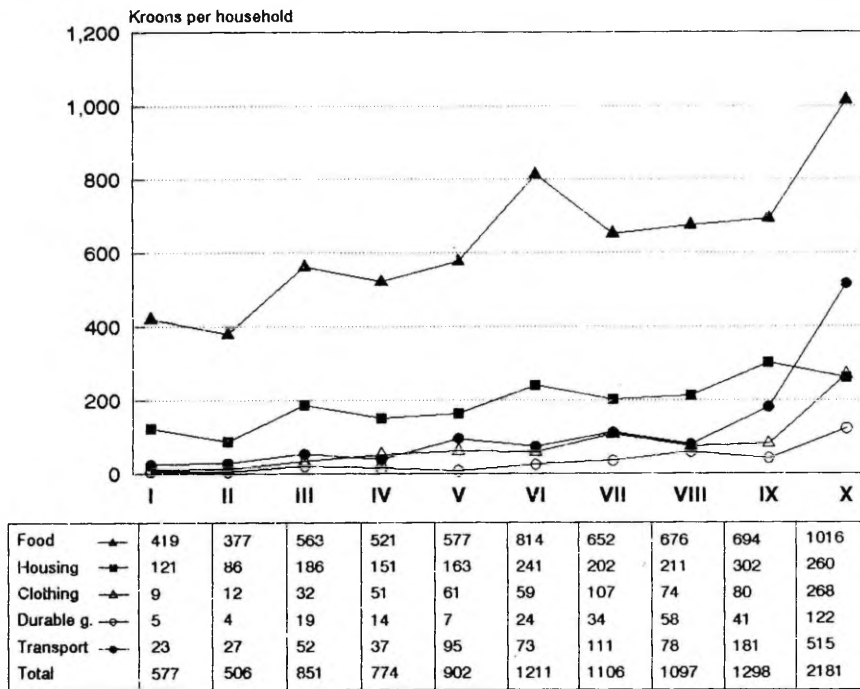
Proceeding from the structure of the expenditures which the respondent households have made in January, a deformed structure of consumption is revealed. Almost all the households (the upper tenth excluded) have a rather similar consumption struc-

Figure 2. The structure of household consumption in expenditure deciles in January 1993.



Household deciles are calculated on the basis of household consumption per OECD

Figure 3. The structure of household consumption in expenditure deciles in January 1993.



Household deciles are calculated on the basis of household consumption

ture: about half or more on food, 15–20% on housing, about five percent on clothes, shoes, etc. The possibilities to meet other needs like purchasing durable goods, paying transport costs, education, leisure, health, traveling are very limited. Whereas the share spent on food is smaller compared with August 1992 when it formed up to 3/4 from the household disposable income (Kutsar and Trumm 1993, 140), the household budget is even tighter due to the increased housing costs. Many households cannot pay for housing or pay only a part of it.

The absolute expenditures (in kroons) of the households reveal different standards of living. The households with a lower standard of living and low resources have to accommodate in their way of life to their small financial resources. The households with higher living standards aspire to develop a way of life that needs more money and would be in conformity with their financial as well as a social position.

## Discussion

### *New socio-political tasks and responsibilities*

The IMF Annual Meeting held in Washington in 1993 referred to Estonia as one of the five East European countries which had most obvious progress in the transition process. In accordance with the Report of IMF Mission the decrease in industrial pro-

duction has stopped and probably will be replaced by a slight increase at the second half of 1993. The inflation rate did not exceed 2–3% per month during the first quarter of this year. The foreign trade balance has been positive for the same period. The unemployment rate has remained lower than expected (by the prognosis it will reach 5–6% of the population of working age by the end of the year). The government pays special attention to the acceleration of the privatization process.

The share of households whose disposable income was lower than the cost of the minimum food basket (physiological minimum of survival) dropped from ten percent in August 1993 to 3.3% in January, at the same time, for the reason of increased level of minimum salary, 36% from the monitored households in January received income less than one minimum wage per person, in August 1992 correspondingly 26% (Kut-sar and Trumm 1993, 137).

Today people in Estonia make attempts to reach the normal society and by the quickest possible way to experience "western consumerism" formulated by Bob Deacon (1992). Some psychological preconditions for that purpose are patience and assiduousness of the Estonian character, appraisal of individual work and comparatively high educational level of the population. At the same time there are several factors setting limits to that process.

The major problems of the social sphere in a situation of limited resources are connected with the elaboration of social guarantees for less secure groups and the organization of social services proceeding from the new tasks and responsibilities. There are several groups of people who because of different reasons are dependent on the social welfare system or expect to receive social aid. Firstly, these are the people in retirement age, mothers taking maternity leave, handicapped, etc. They form a traditional group of people who in some way are dependent on the welfare system. Secondly, there are people who after having lost their job or permanent income unexpectedly find themselves among the group which at least, temporarily, needs social welfare services.

The number of welfare recipients cannot be expected to decrease. The people who have been the subjects of provision of welfare goods, are passively waiting for the help from the outside. The life philosophy of planned economy has produced passivity and learned helplessness. Work has been guaranteed for everybody, unemployment as a social problem did not threaten anybody. State subsidies on food, housing, transport, free education and health care have been financed by the state, the social welfare system has offered services to the people without demanding money from them.

Are the people ready to face new socio-political challenges? In September 1993 the government of Estonia established a poverty line for a household calculated from the disposable equivalent income by the OECD equivalence scale. The line is set on the level of EEK 280 per consumption unit for every month as a level of physiological survival. Momentarily a heated discussion against this regulation began. The main argument was that EEK 280 per consumption unit is hardly sufficient for living nowadays. The dilemma for ordinary people consists in striving to maintain the previous standard of living on the one hand, and on the other hand the visions of the normal life in a changed situation

The main socio-political task in a transformational society is to reach the optimal balance of limited resources between the economic development and social expenditures. The state should take the responsibility of creating possibilities at least for the minimum survival for every citizen. However, it does not mean that there is an obligation to keep the social benefits above the expected poverty level. The obligation of the state is to find tools for every citizen, to encourage people to invest in society and produce resources for one's welfare.

The ruins of the poor institutional welfare system cannot cope with the tasks formulated above. The situation of economic depression presumes sufficient cuts in the

social welfare system. The most effective possibility for the restriction currently seems to be the application of the strategy of “cutting the cream on the cake”, formulated by Heikkilä and Lehto (1992, 8). It means that the preserving only the “basic services” and “basic security” and cutting more heavily those sectors that are somehow special or used by better-off clients. The need for basic welfare services will be determined by means-test. This idea is derived from the liberal laissez-faire economics and is connected with the belief that such cuts will lead to a new path of economic growth (Wiman 1987, 34).

In conclusion, the transformation process in Estonia has led to a deep economic depression and the decrease of people’s welfare. The new social situation creates problems of coping with everyday life for many people and households. People coming from the totalitarian system lack self-help mentality, they have to reform their whole life philosophy. The social policy is faced with the circumstances where response to the situation is needed. The question under discussion is how to meet the interests of the helpless without making any damage to the enterprising spirit of the economically successful people and economic progress in general.

The last socio-political developments in Estonia verify that the stake has been made on the economic development of the country. The general socio-political principle remains the same if compared with the pre-war independent times: the task of the state is to support disabled people who cannot work, the state does not take the responsibility of guaranteeing a minimum standard of living for everyone.

## References

- Deacon, B. (1992). East European welfare: past, present, future in comparative context. In: *The New Eastern Europe: Social Policy, Past, Present and Future*, edited by B. Deacon, pp. 1–30. SAGE Publications.
- Dellenbrant, J.Å. (1993). Democracy and poverty: the implementation of social reforms in the countries of central and eastern Europe. *Scandinavian Journal of Social Welfare* 2(3):150–157.
- Ferge, Z. and Kolberg, J.E. ed. (1992). *Social Policy in a Changing Europe*. Campus/Westview: Boulder, Co.
- Heikkilä, M. and Lehto, J. (1992). *Adjustment or Crisis? Themes No 10*. Helsinki: National Agency for Welfare and Health.
- Kutsar, D. and Trumm, A. (1993). Poverty among households in Estonia. *Scandinavian Journal of Social Welfare* 2(3):128–141.
- Marklund, S. (1993). Social policy and poverty in post-totalitarian Europe. *Scandinavian Journal of Social Welfare* 2(3):104–114.
- Marody, M. (1992). *Building a Competitive Society: Challenges for Social Policy*. A background document for the International Seminar “Towards a Competitive Society in Central and Eastern Europe: Social Dimensions”. Kellokoski, Finland.
- Uusitalo, H. (1992). *The Scandinavian Welfare State and Poverty*. Themes No 4. Helsinki: National Agency for Welfare and Health.
- Wiman, R. (1987) *From the Welfare State to a Welfare Society*. Helsinki: National Board of Social Welfare.



# CURRICULUM VITAE

DAGMAR KUTSAR

*Kodakondsus:* Eesti

*Sünniaeg:* 15.12.1951

*Perekonnaseis:* Abielus, kaks last

*Aadress:* Tartu Ülikooli sotsioloogiaosakonna perekonnauurimisrühm,  
Tiigi 78–230, EE2400 Tartu

*Telefon:* 3727–430809(t); 3727–488382 (k)      *Fax:* 3727–435440

*e-mail:* urmas @ psych.ut.ee

## HARIDUS

Lõpetanud Tartu Ülikooli psühholoogiaosakonna 1975

## ERIALANE ENESETÄIENDUS

Aspirantuur (sotsiaalpsühholoogia) Tartu Ülikoolis 1980–1983

Psühhoteraapia kursused Sankt Peterburis 1980

Kursus lahenduskesksest lühiteraapiast, Tartu-Tallinn 1991–1993

Kursus sotsiaaltööst ja sotsiaalpoliitikast, Kainuu (Soome) 1991

Kursus abielusuhete rikastamise treeningu juhtpaaride  
väljaõppest, Tartu-Pärnu-Otepää 1990–1993

Enesetäiendamine uurimistöö alal Helsingis (Soome) 1990

## ERIALANE TEENISTUSKÄIK

Tartu Ülikooli perekonnauurimisrühma teadur 1977–

Tartu perekonnanõuandla konsultant 1980–1982

TÜ sotsiaaltöö õppetooli lektor 1993

Loengukursused:

Perekonnapsühholoogia

Intervjueerimisstrateegiad

Sotsiaaltöö ja perekond

## TEADUSLIK TEGEVUS

*Peamised uurimisvaldkonnad:* perekonna formeerumise, arengu ja purunemise sotsiaalpsühholoogilised seaduspärasused; perekondade majanduslik ja psühholoogiline toimetulek sotsiaalse transformatsiooni ajal; perekonnapoliitika.

*Teaduslike publikatsioonide üldarv:* 40, nendest viimase 5a jooksul 15.

**DISSERTATIONES PSYCHOLOGICAE  
UNIVERSITATIS TARTUENSIS**

1. Jüri Kruusvall. Environmental and social influence on human activity.  
Tartu 1994.



ISSN 1024-3291  
ISBN 9985-56-100-7