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# Emancipation in a Reception System: Asylum-Seekers in Poland in a Security Grey Zone Between Liberal Democracy and Nation-State

Mateusz Krępa\*

*The security of asylum-seekers in the context of conditions of reception has not been frequently researched. This article aims to fill this gap by arguing that asylum-seekers in Poland are stuck in a grey zone between being secure and being securitised by the host society, with little opportunity to use their own agency. The basis for my study is the theory of the Welsh School of Critical Security Studies which focuses on understanding security through emancipation. The methodology contains a structural analysis of the reception system through the lenses of the agency–structure relationship and a legal and institutional study, as well as an in-depth examination of security practices combined with a reconstruction critique. The results show that the Polish reception system is a structure which is highly asymmetrical in relations of power, especially in the fundamental case of setting a security agenda. This thus constitutes a substantial constraint on migrants' agency – with some potential for emancipation, however. In conclusion, the research points out the discrepancy between elements of the reception system driven by principles of liberal democracy and the nation-state and calls for a more inclusive, empowering and participatory security provision within the reception system in Poland.*

*Keywords: asylum-seekers, reception system, Poland, agency, emancipation*

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## Introduction

Increased migratory flows all around the world have led to thriving academic discussion on the phenomenon. The biggest impact of this topic can be observed in sociology, with the manifesto of the 'sociology of mobilities' (Urry 2000) and the emergence of numerous concepts such as the fluid society, super-diversity and transnationalism (Grzymała-Kazłowska and Phillimore 2018). Migration also becomes one of the central notions of analysis in security studies and its critical branch in particular. Jef Huysmans (2019) points out that migration is among the political and policy concerns to be approached from a security angle in the very near future. However, the scholars concentrate more on border regimes, push-backs, detention or irregular migration than on the conditions of reception (International Organization for Migration 2019). This seems to be continued as migrants on the Polish-Belarusian border are currently facing push-backs and are experiencing many dangers that can even result in death (Grzymyski, Jaroszewicz and Krępa 2021). Nonetheless, I focus on the Polish reception system exclusively, apart from what is happening on the border, to expose how much emancipatory change can be achieved within a nation-state frame for a person who has managed to lodge an asylum application. Importantly, recent studies on reception facilities emphasised their Janus-faced reality based on both care and control (Malkki 2002; Szczepanikova 2013) stemming from geopolitical realities such as, *inter alia*, the transformation of the European political space (Andrijasevic 2010). Although the Polish migration law follows EU regulations, there are still significant differences in the mode of operation in various member states and also between the spacial-political dimensions of the EU as a whole and its members (Rigo 2008).

Moreover, some researchers, with the use of 'push-pull' models, contribute to the perception that asylum-seekers do not possess the ability to widen the scope of their autonomy within migration systems (Squire 2017). Migrants are often subjected to different forms of '-isations' – such as securitisation (Aradau 2004; Bauman 2016; Bigo 2002; Fomina and Kucharczyk 2018; Karyotis 2011; Tsoukala 2011), criminalisation (Siegel and Nagy 2018) or (de/re)politicisation (Cuttitta 2018). The way in which migration is being researched suggests that migrants are seen as the objects of actions undertaken by states or societies. Despite the human-rights protection systems in many countries, non-citizens have little or no influence on the policies concerning (governing) them. However, some academics appealed for research to shift analytically from the subordination to the potency of migrants (Mainwaring 2016; Squire 2017), which is in line with the 'empowerment' approach common in social-policies literature (Rappaport 2002). The aim of this paper is thus to contribute to the debate by applying the achievements of Critical Security Studies (CSS) in their investigation of the potential for asylum-seekers (henceforth I use the term 'migrants' interchangeably with 'asylum-seekers' to denote exclusively those undergoing the asylum procedure) in Poland to exercise their agency in the realm of security.

I argue that the Polish reception system (of admission and social assistance for asylum-seekers during the asylum procedure) constitutes significant yet not completely oppressive constraints on migrants to fulfil their security potential – i.e. to be agents instead of objects. This state of affairs stems from, firstly, the exclusion of migrants from setting the security agenda, secondly the substantial power asymmetries between them and Polish citizens and, thirdly, the political practices manoeuvring between securing (i.e. ensuring migrants' safety) and securitising migrants (i.e. presenting them as a threat to the country and its citizens). Therefore, asylum-seekers remain in suspension – being neither criminals nor beneficiaries of protection; the reception system is not a prison. However, it does not imply migrants' admission to the community – its indeterminacy stems from a substantial tension between two hypostases of the Polish state: liberal democracy and the nation-state. While using these terms, I understand fuzzy sets

of ideas and desired principles or imaginaries rather than clearly defined polities or philosophical systems. Hence, the former set embraces dialogue, human rights, diversity and changeability, whereas the latter denotes an attachment to axioms, the 'national interest', homogeneity and the *status quo* (cf. Booth 2007; Follis 2012; Malkki 2002). I conclude the study by rejecting the 'desecuritisation' approach and offering a possible remodelling of the system in question to make it more emancipatory. To prove my argument, I elaborate on the following research questions:

- What is the position of the asylum-seeker within the reception system regarding the agency–structure relationship?
- How do the legal provisions frame the possibility of migrants making autonomous decisions on exercising agency in the realm of security?
- How do the real security practices undertaken within that system constrain migrants' agency?
- Do the empirical data prove that the Polish reception system provides a security to asylum-seekers which is understood as emancipation or it is, rather, 'security in a cage'?

The methodological foundation of the study is the use of Margaret Archer's (2000) morphogenesis theory to demonstrate why agency (the potential to both autonomously decide and to transform the conditions embedded in the reception system) is vital in understanding the central concept of CSS – which is emancipation. I then examine the Polish reception system through a structural and legal analysis combined with the outcome of a literature review of in-depth insights provided by recently published studies on the topic. My observations during my six years of professional work experience within the Polish reception system are also relevant for the study.

### **Morphogenesis and the Welsh School of Critical Security Studies: the conceptual interdependence of agency with emancipation and its methodological implications**

The relationship between structure and agency is one of the central issues in the social sciences and is also relevant for migration studies (Bakewell 2010; Squire 2017). Multiple definitions of agency have been created with the common features of intentionality, voluntarism, choice and the autonomy of individuals from structural constraints (Campbell 2009). In turn, I understand structure as capabilities, ideas and institutions which are external to individuals (Cox 1981). This relationship, which occurs through social practices, constitutes the core element of critical inquiry (Strydom 2011). Yet, agency depicts not a mere autonomy in relation to other actors but the voluntarily active side of the person which constitutes an agent – a completely passive being can stay autonomous but not agential. It is in this way that 'agency' is understood by many scholars (e.g. Bakewell 2010; Mainwaring 2016; Siegel and Nagy 2018; Squire 2017).

The structure–agency dilemma has already been addressed by various scholars. Archer (2000) has proposed an analytical dualism that allows for the exploration of the interrelationships between structure and agency which enable the investigation of power relations. According to her theory, it should firstly be noticed that human actions are not determined by but conditioned by society. Second, the structures are reproduced with the possibility of being transformed throughout the process known as morphogenesis, within which agency and structure can be analysed separately. Then, more (self)understanding of one's agency would lead to a more 'emancipatory collective action' (Archer 2000: 2) as agency triggers 'powers which ultimately enable people to reflect upon their social context, and to act reflexively towards it' (2000: 308). Archer (2000) rejects rational choice theory, therefore she claims that individuals exercise their agency reflexively and creatively and that the final consequence of one's action is difficult to predict. Such an approach offers a helpful tool for examining migration (Bakewell

2010) and is consistent with views on agency and the structures of the proponents of a critical approach to security – by both elucidating structural oppression and enabling change (see, in particular, Booth 2007 as well as Mainwaring 2016; Wyn Jones 1999). According to Wyn Jones (2001: 16), posing the question of agency is indispensable to ‘orientate theorizing toward emancipation’ and, in practice, within Critical Security Studies (CSS) there is an urge to strengthen the agency of those ‘whose security is governed’ (Basu and Nunes 2013: 68).

The adjective ‘critical’ in this context refers to two features of these studies on security. One is its opposition to the ‘traditional’ approach, conceiving states as the only referents of security and military threats as the main field of research (precursors: Buzan 1983; Buzan, Wæver and de Wilde 1998). A second incarnation of that critique is manifested by drawing on Gramscian theorisation to unmask multifaceted hegemonic relations (Cox 1981) and, more importantly, on the Frankfurt School, especially when putting an individual as the ultimate referent of security and anchoring the analysis in the concept of emancipation (Booth 1991, 2007; Wyn Jones 1999, 2001). Importantly, emancipation is not an act of salvation with the possibility to point out the moments ‘before’ and ‘after’ but, rather, a state of mind or mode of existence based on consciousness, with free will always present to some extent (McDonald 2014) and with permanent room for improvement (Wyn Jones 1999). Scholars representing the latter part of CSS have started with the previous understanding of security as a lack of threats (Booth 1991; cf. Buzan 1983) but they postulate seeing security as being inseparably intertwined with the struggle for freedom (Booth 1991) and exposing structural impediments that impact on the lives of individuals and groups (Basu and Nunes 2013). Yet theorising about structures without addressing agency precluded the offering of a complete emancipatory project, which is especially visible in Cox (1981). In sum, the emancipation–security nexus has been explained as follows: reducing the threats promotes the freeing of people from oppression and humanises them, while diminishing structural oppression creates a space in which people feel safer (Booth 2005, 2007; Wyn Jones 1999). To achieve this goal, measures in the form of both recognition and redistribution are necessary (Booth 2007; Wyn Jones 2001) to ensure respect for different worldviews with the equal enjoyment of both rights and material resources. Therefore, ideally, refugees should be granted the same rights that citizens enjoy, because security cannot be achieved without the power deriving from membership in a political community (Linklater 2005). Hence, emancipation can lead to a cosmopolitan democracy replacing sovereign nation-states if it can be proven that cosmopolitanism – better than nation-states – serves common security (Booth 2007).

It is important, here, to address a predicament when using the concept of security, what has been raised by the third – post-structuralist – strand of ‘critical’ security studies (so-called Paris School, e.g. Bigo 2002; Tsoukala 2011). Setting the security agenda is itself a manifestation of power (Buzan 1983) and, as Cox (1981: 128, original emphasis) has stated succinctly, ‘theory is always *for* someone and *for* some purpose’. Thus, ‘[c]ritical theory must be partisan in its concern for the oppressed and the marginalized’ (Wyn Jones 1999: 69). To achieve this, the mechanism of migration policy and politics should be deconstructed by focusing on securitisation, which means moving issues from ‘normal’ politics into the realm of an emergency and, hence, justifying the use of extraordinary means (Buzan *et al.* 1998). This stress on political power and the symbolism of security is in line with CSS; however, paying attention only to a discourse is insufficient (Booth 2007). Drawing on Didier Bigo’s (2002), Matt McDonald’s (2008, 2014) and Rita Floyd’s (2011) work on securitisation, I understand it not merely as a speech act but, also as sometimes tacit political practices, which means they are visible through jurisdiction, legal stipulations and physical security measures which construct asylum-seekers as a threat. Therefore, in sum, the more securitised migrants are, the more their agency becomes problematic for the state because it

starts to be seen as threatening so-called national security (Mainwaring 2016; Mainwaring and Walton-Roberts 2018). In consequence, this lowers their potential for emancipation, i.e., for deciding upon the security provision. Moreover, social and psychological issues (e.g. relative deprivation and social exclusion) in the light of research seem to be of particular importance for criminogenic processes which may lead even to terrorism (Hardy 2018). In this way, securitisation produces insecurity.

Some scholars go even further and propose the radical rejection of the notion of 'security'. According to Claudia Aradau (2004), the conceptualisation offered by the founders of the Welsh School is caught in the trap of securitising the hosting society as a threat for migrants and, thus, maintaining *antagonism*. Instead, she offers an approach aimed, rather, at abolishing the fight than at supporting one side of the struggle (Roe 2004). Such a 'desecuritisation' approach is based on a previous understanding of the term as the 'shifting of issues out of emergency mode and into the normal bargaining processes of the political sphere' (Buzan *et al.* 1998: 4; cf. Roe 2004) but also assumes recognition of the 'Others' as equal political subjects (Aradau 2004). This can be achieved when citizens start to perceive migrants not as 'just migrants' but as humans with all the complexities of their identity and personality (Aradau 2004; Roe 2004). They then stop supporting some institutional practices (e.g., deportations) undertaken 'in their name' against persons from outside the political community (Aradau 2004). Thus the main contribution made by Aradau is the attempt to broaden the scope of the agency of asylum-seekers (Roe 2004), which is claimed to be beneficial for all. A lack of autonomy hampers integration (Szczepanikova 2013) and the securitisation of migration is illogical and counter-productive (Karyotis 2011), whereas liberation and redistribution eradicate antagonism and violence. Therefore, '[e]mancipation, empirically, is security', not the price of it (Booth 1991: 323), hence more emancipation for migrants means more security for all.

However, an important question stems from the dilemma concerning the intentional avoidance of migrants using their own agency. The socialisation of people as subordinate and psychological manipulation results in their lack of 'the capacity to use their *own* understanding' (Booth 2007: 112–113, original emphasis). This leads to *alienation*, understood as a conflict arising from functioning in a society between what is their 'own' for individuals and their real existence, a kind of 'subjugation' of the human 'essence' (Lukács 1971: xxiv). The issue is whether the persons concerned would agree with subordination if, firstly, they are provided with full knowledge (e.g. about ideas of feminism, lifestyle in Europe, or Polish law provisions for victims of domestic violence) and, second, they are capable of deciding 'rationally' (e.g. without emotional pressure from family or a fear of supernatural forces). Hence, the crucial issue seems to be the provision of information about the possibility of a different way of life which would allow migrants to understand that they can choose how to live and the state's readiness to support them if their choice provokes a hostile reaction to their family. Only then can it be said that a person makes a voluntary, 'own' decision with critical distance from the structures.

The above-mentioned solutions determine the choice of the methodology for my research. I start with a structural analysis of the reception system in order to explore the agency–structure relationship and identify any asymmetries of power distribution. I then analyse the security measures – set by the system and exercised in practice – regarding the scope for agency (or, more precisely, the free choice of agency) which they give to asylum-seekers. The sources contain all the legal acts establishing the reception system as well as the tender documents and informational materials of the state agencies on the topic, with attention paid to their discourse in a bid to unveil hidden political assumptions. To fully reconstruct the phenomena in question, I use secondary sources in the form of studies mainly based on observation, file reviews and direct in-depth interviews, conducted recently by academics, NGOs, the Ombudsman (RPO) and the Supreme Audit Office (NIK) and supported by my occupational knowledge



from my former work in the Office for Foreigners. The above-mentioned studies on the Polish reception system provide qualitative data on the lives of asylum-seekers in Poland – the results of 11 biographical interviews with foreign women who have experienced violence from a partner (Klaus 2016, 2019) and of 30 interviews with mainly Russian, Ukrainian and Syrian asylum-seekers in Poland (Pachocka, Pędziwiatr, Sobczak-Szelc and Szałańska 2020). The results are analysed knowing that there was no random sampling in these studies and that basing the analysis mainly on interviews carries the risk of missing those individuals with the least agency who do not want to speak (cf. Klaus 2016). Due to this predicament, the findings of the interviews are used to present a variety of experiences and interpretations rather than generalising. Next, using abductive inference, diagnostic analysis and a reconstructive explanatory model (Strydom 2011) I conclude on the position of asylum-seekers in a security context within the Polish reception system.

Anticipating possible criticism of my declared methodology, I advance the following caveats. The status of the scientist always raises ethical questions, especially while researching the lives of people originating from different backgrounds. Therefore, examining concepts in an interpretative and ‘culturally sensitive’ way is essential (Basu and Nunes 2013). However, it should be recognised that the culture can itself become oppression if it assumes, for example, the inferiority of women (Booth 1995, 2007). As both positivism and postmodernism hinder emancipation, the renunciation of allegedly values-free – yet, in fact, supportive for the dominant and the political *status quo* – scientism cannot lead to relativism failing to address normativity at all (Booth 1995, 1997, 2007; Cox 1981; Wyn Jones 1999, 2001). Thereby, following the contemporary trend in Critical Theory, I assume as a goal a rational and common-for-all ‘anthropologically rooted moral-psychological need for recognition’ of one’s agency in pursuit of ‘cooperative self-realisation’ (Strydom 2011: 104–105, 114; cf. Wyn Jones 1999) – i.e., a cogitative free choice with respect to others’ freedom (cf. Booth 2007). This also shapes my approach to the intentional avoidance of exercising agency as signalised earlier. Therefore, the combination of a system (structural and legal) examination of state bureaucracy with in-depth insights concerning lives and cultures of migrants seems to be the most pertinent methodological choice. Recognition of both the coherent picture of the reception system presented so far in Polish science and the various points of view of particular asylum-seekers is a solution for possible ethical constraints concerning my previous professional engagement in that system.

Last but not least, the analysis should abandon methodological nationalism and reveal distorted, ideological, naturalised or reified (Strydom 2011) practices such as, firstly, unequal power distribution, secondly, hidden normativity, thirdly, social constructs conceived of as natural laws or attributes and finally, the alienation of social institutions from individuals (cf. Booth 2007). Therefore, the ‘Polish reception system’ should be considered as the both people (government officials and civil servants with their interpretations) and the structure (law, procedures, norms, routine, symbols) animated by those individuals. Also security, as a lack of threats depends on our interpretation what the threats are. Struggles over interpretation (which I call the ‘interpretation clash’) should be seen as resistance; choice can be free whereas emancipation is always against oppression, hence the resistance is a choice countering some power (cf. Mainwaring 2016). It corresponds with the methodological assumption of Critical Theory that considers reality as experienced through constraints, which we do not contemplate but resist (Strydom 2011) and, in fact, agency partly overlaps conceptually with power (Campbell 2009) and with resistance. Such resistance can lead to the emancipation from instrumental securitisation, different kinds of exclusion or inherited cultural constraints. In sum, therefore, security-as-emancipation means the eradication not only of threats but also of *antagonism* and *alienation*.

### **Ternary asymmetry and the interpretation clash: asylum-seekers' power(lessness) from a bird's-eye perspective**

In this section I lay out the general picture of the reception system in question by elaborating on the position of an asylum-seeker in Poland regarding the agency–structure relationship. Firstly, it is crucial in this analysis to elucidate the basic relations of citizens with non-citizens in order to prove the substantial limitations of migrants' agency in the realm of security due to the power asymmetry and their exclusion from setting the security agenda. States can pose a threat to their members (Booth 1991; Buzan 1983; Wyn Jones 1999); thus migrants are even more endangered because human rights without citizen rights become, to some extent, illusory (Booth 2007; cf. Klaus 2020). At the same time, migration is heavily and purposely securitised in the Polish political discourse (Fomina and Kucharczyk 2018; Klaus 2020; Pachocka *et al.* 2020), which can also impact on interpersonal relations in the field.

Continuing my investigation of the position of individuals within the reception system, it is essential to notice that the system in question is based on state law. Therefore we can argue that it forms a structure created by people (citizens) who do not participate in it as objects while its objective participants (asylum-seekers), in turn, have little institutional power (agency) to transform that system. Furthermore, as social reality is being constituted through communication, their lack of Polish language skills is another significant obstacle for migrants to become agents (Klaus 2016), while integration measures provided by the state are not sufficient (Supreme Audit Office 2015). Moreover, the amount of financial benefits often forces migrants renting flats to live in substandard conditions (Klaus 2014; Supreme Audit Office 2015). This lowers migrants' feeling of possessing safe accommodation and, hence, their potential to be self-confident social agents. Last but not least, according to the law, the reception centre's residents are obliged to follow the instructions of the staff (Act 2003: art. 82.1.2) and they receive any correspondence concerning the asylum procedure through a centre employee (art. 54.2) which strengthens the migrants' sense of being supervised (cf. Klaus 2016). Hence there is a considerable power asymmetry between individuals, i.e. between asylum-seekers and Polish citizens as civil servants and society members.

Secondly, the structure of this system is highly institutionalised through the law, control, asylum procedures and the provision of the basic needs of migrants by the state agency (Klaus 2019); migrants usually do not know the language and the law (Klaus 2016; Commissioner for Human Rights 2013) and they are often traumatised (Klaus 2014), therefore, their level of cultural capital is not always sufficient to actively participate in education or social life (Pachocka *et al.* 2020). However, to some extent, a principle of communication in a language understandable by the applicant (Act 2003: e.g. art. 82a.7) should be considered as a securing solution. Next, the agency of asylum-seekers can be also constrained by the structures embedded in their community. Patriarchal patterns of family life, conservative customs, and the role of the elders in diasporas (Klaus 2014, 2016, 2019; Pachocka *et al.* 2020) prove that oppressive (i.e. diminishing a person's agency) practices also exist extensively within migrants own communities, with women being particularly disadvantaged. The abovementioned constraints produce an asymmetry between individuals and structures. Of course, an agent and a structure as such are incomparable. My purpose is, then, to show that, as in the case above, the agent operates on a different level of power attribution than that on which the structure is built and the location of individuals within hierarchies of power affects how much autonomy and agency is accessible to them as to individuals (Bagguley 2003).

Finally, due to intensive rotation (Commissioner for Human Rights 2013), asylum-seekers in Poland are not able to create a community which would serve as an efficient representation of their interests and, given their slight number, their feeling of being in a minority is significantly reinforced. Thus, even

with the advocacy of Polish citizens or settled migrants, asylum-seekers' communities seem to be somewhat fluid and feeble when compared to the state apparatus or the element of Polish society who declare an anti-refugee stance – which might constitute 60 per cent of Poland's population (Public Opinion Research Center 2018). It should be also noted that asylum-seekers can work only after a delay of six months in the issuance of their decision (Act 2003: art. 35), due to the protection of the labour market and the avoidance of pull factors (thus they are seen as a threat). Given the importance of labour in Critical Theory (Strydom 2011), migrants' agency is crucially limited when they are forbidden to work and their social structure cannot be constituted around labour daily routine (cf. Squire 2017). Furthermore, the limited physical space of the centres enhances ethnic and cultural conflicts and the autosegregation between the residents, as the different ethnic groups separate themselves from each other (Klaus 2019; Pachocka *et al.* 2020). Notwithstanding the quite high level of homogeneity of the migratory population, facilitating the establishment of some Chechen and other informal networks (Klaus 2016; Pachocka *et al.* 2020), the overall character of asylum migration to Poland proves that a third kind of asymmetry exists: an asymmetry between structures created by Polish people and those created by migrants.

Having outlined the general structural conditions of the reception system, we now need to note that there is a significant difference between the situation of migrants staying in the reception centres and those renting flats independently. We cannot clearly predict which type of assistance is better suited to migrants – it depends on their needs as, in the centre, they receive more support and outside they develop a more independent lifestyle. Therefore, crucial in that matter would be the ease of choice. Yet, according to the law (Act 2003: art. 71.1) accommodation in the centre is the default assistance whereas granting financial benefits to enable migrants to live outside the centre is possible upon request for several reasons – for security among others (art. 72). As the final decision in that matter is up to the Office for Foreigners (hereinafter OF), the agency of asylum-seekers remains limited, which is also important for their integration prospects (Szczepanikova 2013). However, resistance is possible through successfully proving that there is a threat in the centre, for instance, by securitising other residents. This proves that two ways of providing assistance enable the exercise of two sides of power: first, by the OF to make a decision on that matter and second, by migrants to securitise anything inside the centre; however, to be successful this securitisation must adopt the OF's interpretation of security, which I will hereinafter call the interpretation clash – a clash between officials' and migrants' understanding of a security which excludes migrants from setting the security agenda (cf. Bilgin 2003 on security and identity). The analogous process is present during the proceeding asylum claim. Given the provision of non-reification, it is worth remembering that the clash occurs more between migrants' and civil servants' – to some extent discretionary – interpretations of the threats and the proper ways to deal with them, rather than a unitary interpretation of any office as such (Mainwaring and Walton-Roberts 2018; cf. Klaus 2019). Therefore, the asymmetry of power between individuals mentioned before is especially relevant in this context – however, their agency remains conditioned by the structural constraints.

Other examples of the interpretation clash concern patriarchal domination and domestic violence (Klaus 2016). Importantly, the clash might sometimes be a stimulus of one's critical reassessment of his or her own culture and, consequently, it might lead to emancipation from culturally rooted constraints, such as, for instance, patriarchal domination (cf. Klaus 2016, 2019). Emancipation from the cultural constraints depends on the presence of asylum-seekers on Polish territory which, in turn, depends on the asylum procedure (Act 2003: art. 74). Therefore, the arduous process of help for the victims of violence can be interrupted by their voluntary (art. 75) or forced (art. 74.2.2) return to their countries of origin or by irregular migration within the EU (Klaus 2016). Therefore, the power of, first, the OF to determine

asylum claims and, second, of a member of the family to force the others to withdraw the application (art. 40.1) and go to another country (if he or she expects legal problems because of the use of violence) is of a great importance for the victim's life. The striving for agency in such cases is pivotal as the victim can lodge a separate (from the family, cf. Act 2003: art. 27.1–2) application and attempt to stay in Poland. The lack of legal provision for the stimulation of such a decision at a later stage than the initial lodging of the application (cf. art. 27.3) proves that the critical potential of the reception system remains incidental and can be exercised only through the advocacy of other actors – a victim's friends or NGOs (Klaus 2016) – or, still incidentally and discretionally, by the civil servant's suggestion that lodging a separate application is a possibility. Sometimes, too, the civil servants follow a misunderstood 'cultural sensitiveness' and do not want to disturb 'private' relations between a wife and her husband (Klaus 2014, 2016). As a result, some migrants have doubts about institutional security provisions and claim the need to make arrange their own security (Klaus 2019), which proves rather more hopeless than emancipatory. Therefore, there is a strong need for an inclusive approach to solving the problem of the victim, instead of either the state-centric and nationalistic approach of letting the problem 'disappear' when the family leaves Poland or of the relativist ignorance of 'cultural sensitiveness'.

The parent–child relationship, family customs and privacy are other important fields of the interpretation clash in the realm of security (cf. Klaus 2014, 2019). The law obliges the residents of reception centres for asylum-seekers to 'show particular concern for the safety of underage children' (Regulation 2015: §12.1); however, the understanding of this wording is heavily dependent on a discursive construction impacted on by cultural patterns. Another relevant issue of family life is the possibility of practising their traditional cuisine (Szczepanikova 2013). The adults are provided with their meals in the canteen (Act 2003: art. 71.1.b); however, the OF stipulates the need to take into account the cultural norms of the residents and recommends that staff consult the asylum community at the centre (Office for Foreigners 2019b), which is the only official participatory mechanism identified within the system. Yet, the residents can also prepare the food for themselves (Regulation 2015: §11) and are provided with both the appliances (§4.1) and the financial resources (Act 2003: art. 71.3). Moreover, there are some possibilities for migrants to express their opinions on the quality of the assistance received (hence, also on security matters), through regular complaints lodged in their native language (art. 82a.7) or in *ad hoc* evaluation surveys carried out by the OF – these latter exposed the community's highest level of satisfaction with medical care offered and the lowest with the meals (Supreme Audit Office 2015). Given this assessment, the possibility for migrants to cook their own meals provides some room for agency. However, in sum, setting the security agenda rests out of reach of asylum-seekers as any complaints must be within the frame of the law and not *about* it.

### **Manœuvering practices within the reception system in Poland**

Having set the general picture of the reception system, which has exposed the substantial limitations to migrants' agency due to their disadvantageous position which constrains their ability to set the security agenda, I now embark on an exploration of the practices of the system. This analysis will elucidate the existence of both securing and securitising measures within the reception system and contribute to defending the notion of security against desecuritisation proposals in order to strengthen the emancipatory dimension of the identified securing practices.

The Polish Constitution says that Poland ensures the *human* rights and security of *citizens* (art. 5, emphasis added), which suggests that security is somehow a *national* value. However, this wording

should not be overinterpreted, as human rights includes several security provisions which will be presented here. First and foremost, securing migrants is the purpose of international protection (Act 2003: art. 13–18a). In turn, ‘being a threat to the state *or* to the society’ is a reason to refuse granting subsidiary protection (art. 20.1.2.c, emphasis added) although, interestingly, not the refugee status (art. 19.1). Furthermore, the very access to such protection is often hindered by Border Guards arbitrarily denying migrants’ right to apply for asylum (Fomina and Kucharczyk 2018; Klaus 2020) and legislative measures to introduce push-backs. Moreover, asylum-seekers can be detained (if a criminal is to be arrested, then who is to be detained?) or obliged to regularly check in at Border Guard posts if they crossed the border irregularly or if ‘it is required by reasons of national defence or security or the protection of public safety and order’ (Act 2003: art. 87–88). Detention cannot be applied to the victims of violence or if it endangers migrants’ life and health (88a.3) although, in fact, this stipulation is not always observed (Klaus 2020). Thereby, first, securing and securitising practices must be balanced in law: alongside the asylum procedure (aimed at securing migrants) there is also a lurking securitising process in place – limited, again, by some securing provisions. Second, in the legal discourse, the state is reified and alienated from society, suggesting that migrants can be ‘dangerous’ even if society is not endangered by them (and only a mythical ‘state’ is). Third, the previously mentioned balance is distorted by the revealed securitising practices of Border Guards at the frontier hindering migrants’ access to the asylum procedure and later imposing detention or even push-backs.

Manœuvring between securing and securitising migrants is also visible when ensuring their basic needs. The OF provides asylum-seekers, independent of their financial situation, with the conditions indispensable for their material lives – food, shelter, sanitation etc. (Act 2003: art. 70–71). In sum, a glimpse at the elementary, biological aspect of security proves that migrants are kept quite safe and secure. However, it is essential to remember that the ban on migrants working creates an exclusive dependency on the social assistance provided by the OF. The fact that individuals cannot cater for themselves even though they would like to do so deprives them of their agency, which often leads to emotional problems (Klaus 2014). Furthermore, if for some reason they decide to work illegally, they are in danger of exploitation and criminalisation (Pachocka *et al.* 2020). Thus, the only legal choice for migrants is to agree to the level of allowance stipulated by the government. Any possible effort they make to ameliorate their material existence through work is securitised as breaking the law.

Concerning medical aid, this is more inclusive than a nationalistic approach; we can see that the care is, interestingly, the same as for Polish citizens (Act 2003: art. 73) with sometimes even a swifter access to services (Pachocka *et al.* 2020). In each reception centre there is a general practitioner and a nurse (Office for Foreigners 2019b), which makes medical care more quickly available to the residents. Another important fact is the ‘epidemiological filter’ aimed at the diagnosis of infectious diseases which, on the one hand, forms an important measure for keeping migrants safe and secure. On the other, if we take into account the wording of the legal basis for it by claiming that the applicant is obliged to undergo examinations (Act 2003: art. 30.6, 81.1), we *prima facie* see a securitising logic; however, migrants’ refusal to be examined results in them being granted only half of the amount of financial benefits they would normally receive, no accommodation in the centre and the sanitary inspectorate being informed (art. 81.3). This odd logic, combining the *a priori* suspicion that migrants transmit diseases with the rather moderate sanction, indicates manœuvring between ‘national security’ and liberal-democratic provisions.

Another example of manœuvring practices can be found in the struggle against different forms of violence, especially domestic violence, which is frequent in reception centres (Klaus 2016). There are several anti-violence programmes and procedures as well as meetings of centre staff with the police,

a 'Policy of protection of children' (Office for Foreigners 2019a: 8–9) and a general procedure against domestic violence (Act 2005: art. 9d; Klaus 2016). There is also a legal provision ensuring access to the relevant information (Act 2003: art. 82a) which, together with the others, form significant empowerment measures. However, different forms of violence pose a serious threat to the security of migrants, notwithstanding the permanent presence of security guards in each centre (Office for Foreigners 2019b). The problem is also the underestimation of threats by state officials (Klaus 2016). As a result, some migrants exercise agency aimed at 'peace-making' on their own – e.g. by separating fighters (Klaus 2016, 2019). Furthermore, efforts to secure the residents' safety are not able to fully prevent any emerging informal domination of stronger residents over the others through imposing their own rules (Klaus 2019) – often violently to preserve conservative customs (Klaus 2016). Hence, there is both a securitising suspicion of migrants in general and a significant but not sufficient effort to secure the protection of the most vulnerable (cf. Act 2003: art. 68, with less stigmatising – compared to 'vulnerability' – wording: 'persons who may require special treatment'). Another example of such suspicion is a weird stipulation that asylum can be granted in spite of sexual orientation but that 'sexual orientation cannot include acts which according to Polish law are crimes' (Act 2003: art. 14.2, probably conflating the natural sexual orientation with socially constructed sexual customs or practices). In turn, the requirement that all staff participate in a short training programme about the asylum procedure, preventing violence and intercultural relations should be addressed to all outsourced staff, including guards (Office for Foreigners 2019a) and should be recognised as a securing practice. This measure is a step towards a more inclusive approach and provides knowledge about the socially constructed nature of potentially naturalised phenomena (violence etc.); however, probably, once held, training is scarcely enough to have a satisfactory effect. In general, institutional measures against violence have been assessed by scholars as insufficient (Klaus 2016).

Efforts to balance both the securing and the securitising logic have likewise been identified in the case of the maintenance of family ties and preserving migrants' cultural identity – an area even more subjected to discrepancy in interpretation. As both family and culture may either support or constrain emancipation, this field remains full of ambiguity. According to the law, the centre's residents have the right to uphold their customs, national and cultural traditions and religious practices (Act 2003: art. 82a.1). In each facility there are common areas designated for leisure activities and the access of guests to the centre is possible with an OF permit (Regulation 2015: §7.1). Consent for this permit can be refused for reasons, first, of the security of the residents and staff (§7.5.1) and, secondly, the security of the centre (§7.5.2), no matter what it implies. A significant level of discretion concerning this decision strengthens the asymmetries revealed earlier. However, the residents can freely exit the facilities before 11 pm (§12.3); nevertheless, they can only get reimbursed for the cost of transport under certain circumstances (Act 2003: art. 71.1.1.i) and are obliged to come back within two days under pain of the suspension of assistance (art. 77) and within seven days under pain of discontinuation of the asylum claim (art. 40.1.2.3). Given the rather modest amount of financial assistance for both residents of the centres and applicants living outside (Regulation 2016: §2–6) and female residents' fear, often, of going out due to the remote location of the centre (Klaus 2019) or of patriarchal oppression from their husbands (Klaus 2016), the possibilities of having meetings outside home seem scarce. Moreover, most of the centres are located in remote areas because of the delicate procedures and market reality (Klaus 2019; Pachocka *et al.* 2020), which show the impact of a system superior even to the nation-state, namely capitalism. This is similar to the medical care which deteriorated after replacing the public operator with a private entity (Pachocka *et al.* 2020). In sum, the possibilities of maintaining substantial links with the real world outside the centre are significantly constrained while the conditions inside,

though being diversely assessed by different actors (Supreme Audit Office 2015; Pachocka *et al.* 2020) cannot, due to the permission required to visit, provide an undisturbed social life as well. This weakens migrants' ability to create social structures and underlies the asymmetry exposed.

Last but not least, another example of manoeuvring practices is the alimentation of children. The conditions required if the state is to provide children over the age of six with food – namely that he or she attends school (Act 2003 art. 71.3.1) – may be seen by migrants as a disciplinary measure aimed at compelling parents to send their offspring to school (Pachocka *et al.* 2020). This measure both securitises migrants as possibly prone to abscond from that duty and secures the childrens' right to an education.

### **Security and how to deal with it**

In this section, I present the implications of my results by reconstructing the reception system as it is built into the structure of the Polish state and, to fulfil the underpinnings of CSS, I offer possible solutions to the problematic issues revealed. Importantly, the alternatives proposed should not be utopian but 'feasible transformations of the existing world' (Cox 1981: 130). Three results are of prime relevance.

First, the overall design of the reception system is construed according to an external interpretation of security; migrants considered as not belonging to the political community are simultaneously both the referents of security and the instrumentalised objects of a securitisation which aims at the reproduction of sovereign power. The question 'Whose security?' means not only 'Who is to be secure?' but also 'What does security mean?' – answering it is the primary manifestation of power or sovereignty reproducing itself through securitisation of all 'Others'. The substantial limitations of asylum-seekers' agency in Poland can be attributed to their disadvantageous position in relation to both citizens' agency and structure (state) and, resulting from this, their scarce ability to impose their interpretation of security mainly due uniquely to their lack of citizenship status. These results support the notion, as has been argued before by other scholars, that the agency of refugees is seen by the state with suspicion and the securitisation of migration serves to 'produce social cohesion, mobilise political support and claim political legitimacy' (Humphrey 2013: 179), as the state's main aim is to construct unity through the exclusion of others by governing people's feelings of insecurity (Booth 2007; Humphrey 2013). Thus, securitisation is the essential analytical tool with which to grasp the government's power, manifested in presenting migrants as a threat. This results in citizens distancing themselves from migrants (CBOS 2018; cf. Klaus 2020) and seeking protection from the state which, in consequence, reinforces the government's power as a 'rescuer' (Bauman 2016; Humphrey 2013; Tsoukala 2011) and substantially hampers migrants' emancipation. Thereby, as the findings suggest, the limitations of migrants' agency are not imposed exclusively to ensure security but they do serve to reproduce the government's power.

Second, some emancipatory measures within the system have been identified and more can be proposed to reduce alienation and antagonism. The reception system security practices manoeuvre between securing (inclusive, stemming from liberal-democratic principles) and securitising (nationalistic) approaches – the problem here is not a nation *per se* but its exclusionary praxis leading to antagonism with the 'Others' impairing common security (Booth 2007). However, all emancipatory measures remain limited by 'national security', an excuse for exclusionary logic. Therefore, asylum-seekers remain in suspension, being neither 'criminals' (as irregular migrants) nor beneficiaries of protection (as recognised refugees) and they express (differently named) needs for emancipation. Hence, the reception system as a 'waiting room' is not a prison. However, it does not mean admission to the community – its indeterminacy can be unravelled by referring to the metasystem of the liberal-democratic nation-state

which forms a field of conflict between the principles of human rights and of ‘national security’ (cf. Booth 2007) where the securitisation of the ‘Others’ undermines not only liberal-democratic and humanitarian values in general (Klaus 2020) by alienating some individuals but also jeopardises common security by intensifying antagonism (Booth 1991).

To ensure the victory of human rights over exclusionary security excuses some scholars have argued for ‘desecuritisation’ – ideally through a fundamental political shift from the friend–enemy distinction towards the full inclusion of ‘Others’ (Aradau 2004; Hansen 2012). This logic is in line with cosmopolitan assumptions of CSS – as Mainwaring and Walton-Roberts (2018: 135) have claimed – even with the extension of some rights to migrants; without questioning the very nature of borders and the nation-state, these measures are ‘simultaneously exclusionary’. In fact, the dis-identification of citizens from oppressive practices (e.g., deportations) proposed by Aradau may inevitably create doubts over the very identification of citizens with their political organisation. Yet, this form of desecuritisation raises some worrisome issues. The first issue is how to question the very nature of borders and other security tools without opening the floodgates to all threats (drugs and weapon smuggling, human trafficking, infectious diseases) and how to ensure the safe and effective right to asylum in the case of massive inflows provoked by open borders. Second, as has been already revealed, some migrants in the centres realise their agency either to the detriment of their co-inhabitants’ security or to complement the insufficient security measures in place. This shows the difficulties of attempting to dispose of the notion of ‘security’ because it properly depicts the relevant deficiencies of the system in question. Without the ‘security’ concept, these deficiencies could vanish from our analysis. Third, giving up the struggle over the notion of security strengthens our non-emancipatory understanding of it (McDonald 2014) and, in fact, can be conservative rather than progressive (Hansen 2012). Finally, desecuritisation can mean ignoring the insecurity of the powerless and, hence, be disempowering and silence those who suffer by depriving them of an efficient means to articulate their needs (Booth 2007; Hansen 2012). Thus, even after a radical remodulation of the political order, one problem remains: security – however it is named.

Hence, third, due to the identification of both emancipatory security practices already existing within the reception system (e.g., assistance for the victims of domestic violence) and oppressive structures maintained by the migrants themselves (patriarchal patterns of family relations), I argue that the notion of security can prove its emancipatory dimension as the basis of both international protection and the struggle against various forms of oppression. Therefore, I would rather follow Wyn Jones’s (1999) and Booth’s (2007) arguments for broadening, deepening and extending the security concept and the calls for ‘moderate’, ‘sensible’ (Roe 2004) and ‘just’ (Floyd 2011) securitisation in order to articulate a discourse of security which is ‘radically cosmopolitan’, ‘oriented to the concerns of the most vulnerable’ and ‘concerned with overturning structures of oppression or exclusion’ (McDonald 2014: 161). Therefore, even within the nation-state structure, some further emancipatory measures in the reception system might be offered. The first is de-ideologisation, which means considering the primacy of ‘human suffering, not *raison d’état*’ prism (Wyn Jones 1999: 159) and, thus, shifting from a nationalistic, state-centric and power-driven approach to an inclusive and dialogue-driven one. This is manifested in a compassionate problem-solving (Booth 2007) attitude rather than an antagonistic one, or turning a blind eye (*inter alia* regarding help for the victims of violence) and assumes pro-understanding campaigns as currently present training for staff. Second, it is de-naturalisation in the form of considering vulnerability and a lack of agency not as naturally but, rather, as socially rooted – people are not ‘physically voiceless’ but ‘politically silenced’ (Booth 2007: 160). This step opens the door for more empowering measures, ideally in cooperation with NGOs, in order for the most vulnerable migrants (e.g., Chechen women) to activate their potential for (self)transformation. Finally, it is the de-reification measure, which means



presenting security concept or rules and other structures not as alienated from people and given in advance but as socially constructed and being permanently recreated. Such a step enables the introduction of more participatory measures (gatherings, surveys and committees equipped with real power) in order to orchestrate security practices *together with* asylum-seekers instead of these latter remaining silent. These measures would make the Polish reception system less distorted in terms of alienation and antagonism and, thus, bring it closer to the security-as-emancipation principle.

## Conclusion

In this paper I offered an emancipation-driven analysis of the Polish reception system in a bid to find a third way between presenting migrants as either 'victims or villains' (Mainwaring 2016). It was of great importance to select proper theoretical frames. Uncovering power asymmetries was enabled by Archer's (2000) analytical dualism of agency and structure. Next, the appropriate lenses through which to seek emancipation were provided by Aradau's (2004) critique of the Welsh School of CSS which guided the investigation into the empowerment of migrants rather than to the setting up of advocacy in their name, although the utility of the desecuritisation proposed by her is limited.

I conclude that the structure of the reception system leaves limited space for the emancipation of asylum-seekers. Through its identified power asymmetry to the disadvantage of migrants, the system possesses the power to set the security agenda and arbitrate the interpretation clash with migrants concerning what security means. If, as Booth (1997: 106) has stated, security is an 'epiphenomenon inter-subjectively created', then it is here created *for* migrants (with our interpretation thereof and decision on its scope), not *with* them. Migrants, thus, are secured by being analysed through 'national-security' lenses (with a political goal to reproduce that prism) as a potential threat, i.e. by being securitised. However, the research has pointed out some emancipatory practices embedded in the system, especially releasing migrants from their cultural constraints. In this sense, the analysis supports McDonald's (2008: 568, original emphasis) call for the 'recognition of emancipatory potential *through* security'.

The three feasible remodulations of the reception system offered in this paper (de-ideologisation, de-naturalisation and de-reification) may be considered as a first step towards security-as-emancipation, namely the process abolishing the grey zone between exclusion and inclusion. Also, it would humanise security by making it more linked to the lifeworld of the individuals than to a technical process of reified structures. Yet, it could also be seen as a step towards challenging the sovereign's monopoly of narration about what 'security' means on the ground. As the social order is not once given but is being continuously constructed, each citizen has an influence on the state policy towards the 'Others', which may secure them, securitise them or keep them in the zone in between. Elucidating this dilemma is the great power which lies in migration and vexes us by showing that liberal democracy, combined with the nation-state, in an endeavour to overlap essentially disjunctive values, is prone to create the security grey zone between exclusionary nationalism and inclusive human rights.


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# New Urban Diversity at and after the Economic Downturn: Recent Trajectories of Ethnic Segregation in Central European Cities

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*Immigration is one of the most contentious fields of contemporary European urban policy. While the development of urban segregation is well documented in traditional immigration countries with population register data, there is a lack of detailed research on population dynamics in many countries and cities across Europe. This article examines ethnic residential segregation in Czechia in the period after the economic crisis of 2008. Special attention is paid to the trajectories of individual cities and their position in the urban hierarchy. Longitudinal population register data are used and segregation indicators of unevenness and exposure are computed for the largest cities using a detailed spatial grid. The results show a broad picture of decreasing segregation despite the continuously growing number of immigrants in the country. While the economic crisis temporarily halted immigration, the spatial patterns of immigrant dissimilarity did not change and more-established immigration gateway cities experienced an increase in spatial isolation. In the conclusion, the article calls for further discussion on ethnic residential segregation in post-socialist cities.*

*Keywords: residential segregation, immigration, post-socialist cities, spatial grid, Czechia*

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## Introduction

Residential segregation by race, ethnicity, class or social group as a potential source of conflict and disadvantage in a society has been among the main interests of urban researchers and policy-makers. As with urban research at large (Robinson 2006), understanding the segregation patterns of ethnic minorities or immigrants has originated in studies of paradigmatic cities located in established destination countries of international migration (see, e.g., Panori, Psycharis and Ballas 2018). According to Nijman (2000: 135), the paradigmatic city is defined as a city that displays more clearly than others the fundamental features and trends of the wider urban system. By contrast, relatively little is known about the nature of ethnic segregation, either across city sizes or in new immigrant destinations, which both often provide new settings in which segregation matters. Smaller cities and new immigrant destinations represent a context for segregation research which is equally as relevant as traditional immigrant destinations. Given the largely labour migration character of many migrant populations, it is relevant here to also discuss the links between economic development and changes in ethnic residential segregation. Labour-intensive manufacturing regions and those struggling with economic restructuring are believed to have higher levels of segregation (Musterd 2005).

Exploring the trends in ethnic residential segregation development across individual cities allows an assessment of the general level and dominant patterns of segregation development. This is a basic yet fundamental task in a new immigration context, where most immigrants are first-generation migrants. The ethnic spatial distribution thus reflects, to some extent, their initial residential choice – as residential mobility in Czechia is generally low and housing opportunities for new migrants are both restricted and spatially limited. More advanced research, focused for example on the role of changing housing needs with respect to the shifting age structure of minority populations, is yet to be developed.

This article explores the trajectories of ethnic segregation in Czech cities in the years following the 2008 economic crisis. This undertaking allows us to inform the segregation literature with findings from a previously unscrutinised context – that of a post-socialist country that has recently become an immigrant destination (King and Okólski 2019) and where the number of foreigners doubled between 2001 and 2011. Specifically, we focus on the following research questions:

- What is the extent of ethnic residential segregation across the differently sized Czech cities?
- How has ethnic residential segregation evolved in the post-crisis period 2008–2011–2015?

These questions are answered using newly available geocoded anonymised data on foreign citizens residing in selected large Czech cities in 2008, 2011 and 2015, extracted from the official country register. To protect their confidentiality, the data were aggregated to a rectangular grid (square size of 250m) covering the territory of the cities. The use of population grid data allows us to directly compare ethnic residential segregation across major Czech cities for the first time. As segregation is a multidimensional phenomenon, we focus here on just two of its dimensions (Reardon and O'Sullivan 2004): evenness – measured by the dissimilarity index – and exposure, measured by the isolation index.

The first part of this article introduces the research into socio-economic and ethnic residential segregation in the Central and Eastern European post-socialist region. The second section contextualises the study on Czechia. The third section presents data sources and the methodology used for our study. The fourth section examines the level of immigrant dissimilarity and isolation in the selected large Czech cities. The fifth part of the article provides a comparison of ethnic residential segregation in Czechia as a post-socialist country and in some more-established immigration countries elsewhere in Europe before, finally, key findings stemming from new immigration into the region are summarised.

## Ethnic residential segregation in the Western and post-socialist contexts

### *Theories of segregation*

Residential segregation is a complex, multidimensional phenomenon (Massey and Denton 1988), indicating the preferred or imposed separation of individuals in space and time. In general, it can be understood as the difference in the spatial distribution of the different population groups within a given territory, distinguishing the groups by race, ethnicity, religion, language, wealth, social class or other attributes. The reasoning behind residential segregation measurement is based on an expectation that living in a particular place matters, therefore group differences in places of residence are important mechanisms generating and sustaining inequality (Dorling 2014; Sharkey and Faber 2014). For the purpose of measuring segregation, it can be operationalised along several axes. The recent literature focuses predominantly on the aspects of evenness and of exposure, proposed as key segregation axes by Reardon and O'Sullivan (2004).<sup>1</sup> Evenness is conceptualised as a differential distribution of the subject population, indicating an unequal access to localised resources and infrastructures. Exposure is defined as the composition of people's local environments, measuring the possibility of interaction between groups. The remaining three dimensions of residential segregation focus on concentration, centralisation and clustering.

Ethnic residential segregation is a complex phenomenon, which is illustrated by the number of frameworks explaining the reasons for ethnic segregation to occur and change over time (Krysan and Crowder 2017; Musterd 2020). In general, four main explanations can be identified. First, segregation is thought to be a spatial expression of socio-economic and cultural differences between the minority and the majority population, differences which are expected to decrease over time, as proposed by spatial assimilation theory (Massey 1985). Both the upward socio-economic mobility of a minority and their acculturation through the adoption of the language and customs of the majority population lead to a residential change, where migrants leave their initial poor and migrant-dense neighbourhoods and move to wealthier ones. The assumption of the straight-line assimilation theory was later revised (Portes and Zhou 1993) to include broader and more nuanced insights into various life domains (Waters, Tran, Kasinitz and Mollenkopf 2010; Zhou 1997).

Second, the stratification framework views segregation as the result of housing discrimination, stereotypes and prejudice based on race or ethnicity which, together, create segmented housing markets and neighbourhood strata within urban areas (Chung and Brown 2007). The European segregation literature also stresses the role of public policy and the welfare state in shaping segregation (Arbaci 2007; Asselin, Dureau, Fonseca, Giroud, Hamadi, Kohlbacher, Lindo, Malheiros, Marcadet and Reeger 2006). The eligibility of population groups for housing and social assistance has the potential to prevent the emergence of stratified neighbourhoods. In a similar vein, cross-national research shows that 'grand ideas' (e.g. the models of immigrant integration, the nature of a country's political economy or the tradition of immigration as a constituent part of the nation or not) impact on immigrant integration (Alba and Foner 2014). Since residential segregation represents the spatial aspect of immigrant integration, these factors are equally relevant for ethnic residential segregation (Koopmans 2010).

Third, the approach of resurgent ethnicity (also termed the ethnic community model) explains segregation as originating in individuals' preferences to maintain ethnic community by residing in ethnically homogeneous areas (Alba, Logan, Lutz and Stults 2002; Brown and Chung 2006). This notion challenges perceptions of ethnic neighbourhoods or immigrant enclaves as places of poverty. Instead,



a socially and economically successful ethnic community might provide positive externalities for its residents, such as reported health (Walton 2012).

Finally, a fourth factor – which has seldom been systematically evaluated (some exceptions are Maloutas and Fujita 2012; Skifter Andersen 2019) – is the local context. The term encompasses a number of determinants ranging from local socio-spatial inequalities and history of immigration to urban governance (Skifter Andersen 2019; Hasman and Křížková 2021). One methodologically important factor of the local context for ethnic segregation is the varying population sizes across cities. Smaller population groups naturally have a greater likelihood of being segregated as they can reside in only a few places (Manley, Jones and Johnston 2019).

### *Context of segregation research*

Although the explanatory frameworks of segregation listed above originate in established immigration countries and can be challenged in the post-socialist context, we believe that the underlying mechanisms which the theories identified remain relevant. Given the differences between them and newer immigrant destinations, these approaches need to be adapted for use in other contexts. Crucially, established immigration countries belong to the ‘Western’ world, whereas some of the emerging ones are located in the post-socialist region, which laid on different ideological and material foundations for over 40 years (Malý, Dvořák and Šuška 2020; Stanilov 2007). According to Přidalová and Hasman (2018), important differences between established immigration countries and new destinations in the post-socialist region include the different lengths of the countries’ immigration histories, the composition of their immigrants’ origins and the specificity of the post-socialist geographical context in terms of the urban structure, housing markets and social inequality. For instance, only a small minority of immigrants can be considered as ‘visible minorities’ and a large share of immigrants have an economic status similar to that of the majority population (Křížková and Šimon 2021).

Moreover, residential segregation is likely to be related to different determinants in the capital city and in smaller cities. Capital cities typically concentrate more political, economic and cultural power and are more embedded in global networks than other cities (Cardoso and Meijers 2016; Connolly 2008). Given this privileged position, capital cities receive different types of migrants than do second-tier cities. The largest cities function as escalator regions, attracting young professionals at the expense of second-tier cities (Champion, Coombes and Gordon 2014). Previous research suggests that the attractiveness of capital cities to both international and internal migration and their connectedness to global networks result in more pronounced and polarised spatial patterns than can be observed in second-tier cities (Haase, Steinführer, Kabisch, Grossmann and Hall 2011).

Conversely, small cities and towns feature different settings as they probably provide a smaller diversity of housing, schools and labour choices. Smaller urban areas, notably those dominated by a certain economic sector like manufacturing, can be impacted on by economic developments to a different extent than larger cities with more diversified economic bases. This is particularly relevant for Central and Eastern Europe (CEE), where the pre-2008 economic growth and post-2008 decline were more intense in the capital-city regions than in the remaining areas (Capello, Caragliu, Fratesi 2014; Cuadrado-Roura, Martín, Rodríguez-Pose 2016).

Immigrants are often perceived as vulnerable populations because of their generally lower socio-economic status, restricted political rights and limited command of the destination-country language. Due to their less-advantageous position in a society, they are more likely to be impacted on by economic crises.

Andersson and Hedman (2016) show that an economic downturn increases the inequality between advantaged and disadvantaged populations on the labour market. Moreover, their results corroborate Musterd's (2005) claim that manufacturing regions and those struggling with economic restructuring have greater social segregation. Consequently, the segregation of vulnerable populations is expected to be higher during economic downturns and to decrease with an improvement in the state of the economy. Given that a substantial proportion of the foreign population in Czechia consists of labour migrants and that this population was indeed impacted on by the economic crisis set off in 2008, we analyse their residential segregation from a longitudinal perspective. Although there are surprisingly few studies which address the impacts of economic crises on ethnic segregation with which we can compare our results, we intend to highlight this relationship and to open discussion of its causes and consequences.

### *Segregation research in post-socialist countries*

Analyses of residential segregation have focused on the largest, often capital, cities (Bolt, van Kempen and van Ham 2008; Malheiros 2002; Musterd 2005; Tammaru, Marcińczak, van Ham and Musterd 2015), leaving aside the segregation experiences of smaller urban areas. Socio-economic segregation (which may be related to ethnic segregation in some cases) increased across Europe between 2001 and 2011, reaching similar values in CEE and Western European cities in the later years (Marcińczak *et al.* 2015). Although the issue of the largest or capital cities as opposed to smaller cities was not the main focus of most of these studies, differences in ethnic residential segregation stem not only from city size but also from the cities' locations within Europe. In line with the advocates of the 'ordinary cities' approach, we argue that segregation studies need to overcome their focus on a few paradigmatic cities of the West and their neglect of cities elsewhere. Truly comprehensive segregation research, like urban studies at large, needs to be informed by empirical studies of 'ordinary cities' across city sizes and world regions (Arbaci 2019; Robinson 2006).

Research on urban segregation is relatively limited in post-socialist countries thus far, when contrasted with research in Western countries which relies on population register data. There is a big knowledge gap (in ethnic segregation) between countries with available long-term register data or countries where important variables such as income are available and many CEE countries, where these options are not yet or are just recently available. The geo-coded and linked population data enable us to trace how certain population groups ended up living in particular neighbourhoods, providing an insight into processes producing residential segregation. This insight is further advanced by the decomposition and examination of all underlying demographic processes and social mobility changes, capturing both spatial mobility and *in situ* changes of and within neighbourhoods (Bailey 2012). In contrast, studies based on census data for a relatively large administrative units tend to measure residential segregation as an outcome of the socio-spatial structuring process. Thus, the aggregate outcome resulting from a mixture of (often contradictory) processes at various spatial scales is evaluated. According to a recent review by Kovács (2020), empirical analyses of socio-economic segregation are relatively rare, with a majority of the studies building on area-level census data stymied with analytical limitations (for example: MAUPs – Modifiable Area Unit Problems – Nielsen and Hennerdal 2017; occupational structure classification or educational attainment classification as a proxy for income – Maloutas 2007). Notwithstanding the data issues, research on both capital and second-tier cities has shown that the socio-economic segregation of population groups tends to increase but that historically developed urban structures and low residential mobility prevented full materialisation of this trend (Marcińczak 2012; Marcińczak, Musterd and Stepniak 2012).

Current research on urban segregation has three distinct but interrelated foci with regard to immigration and ethnicity in post-socialist countries, where socio-economic and ethnic segregation are differently related to each other (Musterd, Marcińczak, van Ham and Tammaru 2017). Firstly, the most common are studies of socio-economic segregation, where ethnicity or immigrant status are of secondary importance. As explained by Kovács (2020), due to historical developments, ethnicity played a subordinate role in post-socialist cities. Thus, in contrast to Western Europe or the US, CEE studies measure socio-economic segregation without having race and ethnicity at the core of the analysis. The second and third groups of studies focus primarily on the ethnic dimensions of segregation which intersect to a different degree with socio-economic differences between the majority and the minority populations. The second group of studies focuses on the residential segregation of established minorities. The time dimension is a crucial factor distinguishing old and established minorities from new immigration groups that present a novel integration challenge. This group includes primarily studies conducted in Baltic countries with large Russian minority populations (e.g. Burneika and Ubarevičiene 2016; Krišjāne, Bērziņš and Kratovičs 2016; Tammaru, Kährik, Mägi, Novák and Leetmaa 2016) as well as other established minorities. The third group of studies (including this study) explores a new immigration, where former socio-spatial patterns are disrupted by the in-migration of foreign citizens. For example, new immigration shapes residential segregation in capital cities and more broadly in countries with recent migration growth such as Czechia or Poland (e.g. Jaskulowski and Pawlak 2020; Přidalová and Ouředníček 2017). In sum, progress in solving the contradictions of segregation in post-socialist countries can build both on improving data quality and on an advanced insight into the ethnic, social and economic intersectionality of population register data.

### **The Czech context of ethnic residential segregation**

Ethnic residential segregation has long been on the agenda of researchers of the post-socialist space, although they have mostly focused on national minorities, including the Roma (Křížková and Šimon 2021). Residential segregation research focusing on new immigrants in the region has rarely been conducted because the Central European post-socialist region has long been typical of emigration rather than immigration (Okólski 2012). The migration balance of post-socialist countries is positive only in a few cases, Czechia being the pioneering country (Eröss and Karácsonyi 2014). Thus, research into ethnic residential segregation is only just emerging in the region (Přidalová and Ouředníček 2017; Šimon, Křížková and Klsák 2020), predominantly covering capital cities with rising ethnic diversity and socio-economic polarisation, Kashnitsky and Gunko 2016; Sageata 2014; Toruńczyk-Ruiz 2014). Processes of neighbourhood change capturing both social and spatial mobility and shaping segregation have not been explored in detail nor measured and compared across cities.

Czechia recently became a new immigration country in the post-socialist context, where a vast majority of the country's foreign citizens arrived as labour migrants in the past two decades (Drbohlav and Lesińska 2014). The number of immigrants grew from 210,000 to 460,000 between 2001 and 2015, resulting in a 4.4 per cent share of foreign citizens in the Czech population in 2015. The number of foreign citizens (i.e., immigrants) has been growing despite the economic crisis of 2008 and the tightening of migration policy in the years that followed. The fast recovery of the national economy led to an increasing demand for foreign workers and a further growth in net migration after 2013 (a similar trend was also observed in Poland by Duszczyk and Matuszczyk 2018).

In general, migrants going to Central and Eastern Europe are more similar – in terms of socio-economic status, cultural background and appearance – to the destination-country population than migrants going to old EU states and North America (Ouředníček 2016). The countries in the CEE region lack international colonial history or *Gastarbeiter* ties to distant countries that continue to shape migration patterns and ethnic diversity in established immigration countries to this day.<sup>2</sup> The mix of migrants therefore differs from that in traditional immigration countries in their cultural distance, language differences and the economic gap between them and the majority population<sup>3</sup> as well as in their length of stay. Less-extreme differences between immigrants and host societies thus provide fewer incentives for spatial segregation. For instance, the limited economic distance of the migrant population and the Czech majority results in both groups operating within a unified housing market. In turn, no one group is more eligible for social housing than the other, a mechanism known in some Western European countries (Andersson, Malmberg, Costa, Sleutjes, Stonawski and de Valk 2018).

Most immigrant groups in Czechia originate from regions of Central and Eastern Europe, the former Soviet Union and Vietnam. The largest groups include Ukrainian (105,000 in 2015), Slovak (100,000) and Russian citizens (35,000). The Vietnamese (56,000) constitute a single numerically significant immigrant group from a culturally distant environment. The foreign population is concentrated in urban areas – particularly in large cities with sufficient labour-market opportunities – and in the borderlands (Janská, Čermák and Wright 2014). More than 60 per cent of foreign citizens live in the 14 largest cities (see Table 1). A third of all foreign citizens live in the capital city of Prague, including a major concentration of citizens from Western countries. The remaining 13 second-tier cities comprise a smaller and less diverse set of immigrant groups, roughly proportional to the main immigration groups at the country level. The exception is Karlovy Vary, a spa city with a large Russian minority. Only the more immigrant-dense cities apply immigrant-related policies, which mostly focus on immigrant social integration and on supporting intercultural events; none of the cities targeted immigrants as a specific group in need of support due to economic or housing needs (Šimon *et al.* 2020).

The spatial distribution and level of residential mobility in Czechia differ between immigrant groups (Přidalová and Hasman 2018). For example, immigrants from Ukraine tend to concentrate in large cities due to their occupational specialisation in manufacturing and housing construction. In contrast, immigrants from Vietnam are more evenly dispersed all over the country due to their largely retail occupations (Janská, Čermák and Wright 2014). Moreover, recent internal and external developments may lead to changes in immigrant spatial behaviour in Czechia. The gradually increasing share of permanent stay permit-holders among immigrants suggests that they tend to settle in the country (see e.g. Drbohlav 2015). Family growth may increase local immigrant isolation, as shown in more-established immigration countries (Finney and Simpson 2009). Another important factor influencing immigrant spatial patterns is the global economic crisis of 2008 and the subsequent changes in the Czech migration policy. Although the global economic downturn did not affect the Czech economy greatly, foreign workers were impacted on to a considerable extent. Shortly after the crisis burst, many lost their jobs, which made their subsequent stays illegal; others left the country. Furthermore, issuing new residence permits for a foreign workforce was halted and their stays were more closely monitored (Ministry of the Interior of the Czech Republic 2009).

A considerable effort has been made to understand the spatial distribution and mobility of immigrants in Czechia (Drbohlav and Valenta 2014; Janská and Bernard 2018; Janská *et al.* 2014; Křížková and Ouředníček 2020; Šimon, Křížková and Klsák 2021). In general, immigrants are more concentrated in cities than the majority population, which is consistent with the predominantly working-age structure of the immigrant population. Although most Czech cities experienced a minor population decrease due

to suburbanisation, their population and economic development are relatively stable, partially thanks to population replacement by immigrants.

**Table 1. Foreign citizens in Czech cities in 2015**

City	Total population	Number of grid squares	Foreign population			
			Total	As % of city population	% of permanent residents	% of change in foreign citizens 2008–2015
<b>Praha</b>	1,288,147	8,321	168,852	13.1	52.2	25.3
<b>Brno</b>	400,977	3,978	24,570	6.1	50.0	36.6
<b>Ostrava</b>	301,503	3,666	9,845	3.3	58.3	0.1
<b>Plzeň</b>	171,526	2,378	13,025	7.6	51.5	9.0
<b>Liberec</b>	105,896	1,877	6,518	6.2	58.9	-0.3
<b>Olomouc</b>	102,392	1,865	3,547	3.5	50.2	15.5
<b>Ústí nad Labem</b>	96,170	1,729	4,185	4.4	66.2	-4.6
<b>České Budějovice</b>	95,377	1,022	3,819	4.0	57.9	35.3
<b>Hradec Králové</b>	94,071	1,851	3,572	3.8	57.2	-2.1
<b>Pardubice</b>	90,160	1,527	4,532	5.0	41.1	65.4
<b>Zlín</b>	76,607	1,847	1,785	2.3	59.7	16.4
<b>Kladno</b>	70,022	928	3,833	5.5	64.0	35.3
<b>Karlovy Vary</b>	51,025	1,085	5,647	11.1	65.3	18.3
<b>Jihlava</b>	51,003	1,588	1,731	3.4	62.4	16.6

Source: Ministry of the Interior (2017); Czech Statistical Office (2017), own elaboration.

However, existing research on ethnic residential segregation suffers from two major shortcomings: the reliance on census data and the use of administrative units for spatial analysis. Firstly, due to the previous unavailability of register-based data, knowledge on residential segregation was limited to census snapshots (see Ouředníček, Pospíšilová, Špačková, Kopecká and Novák 2016; Sýkora 2009) thus preventing researchers from grasping the dynamics of the residential change in between censuses. Census data on the spatial distribution of immigrants in neighbourhoods tell us a little about which individual-level processes are at play; however, we only capture their aggregated outcome. For example, an increase in the differences – between two consecutive censuses – between urban neighbourhoods in the level of education tends to be interpreted as a sign of socio-economic polarisation. However, without the ability to decompose internal and external underlying demographic changes occurring in the ten-year period (Bailey 2020) we are unable to identify which micro-level processes are responsible for this change (social and spatial mobility, physical and functional characteristics of a neighbourhood, within-neighbourhood changes). Other researchers opted for survey-based research (Drbohlav and Dzúrová 2017) and for case studies of particular localities or focused on particular immigrant groups (Šnajdr and Drbohlav 2016) instead.

Secondly, the use of data available for administrative units such as municipalities or city boroughs in quantitative research limited the level of spatial detail for the analysis of residential segregation. Previously, there were no detailed data about the internal differentiation of immigrants for Czech cities (except Prague) and only total numbers of foreign citizens in each city were available. Moreover, the

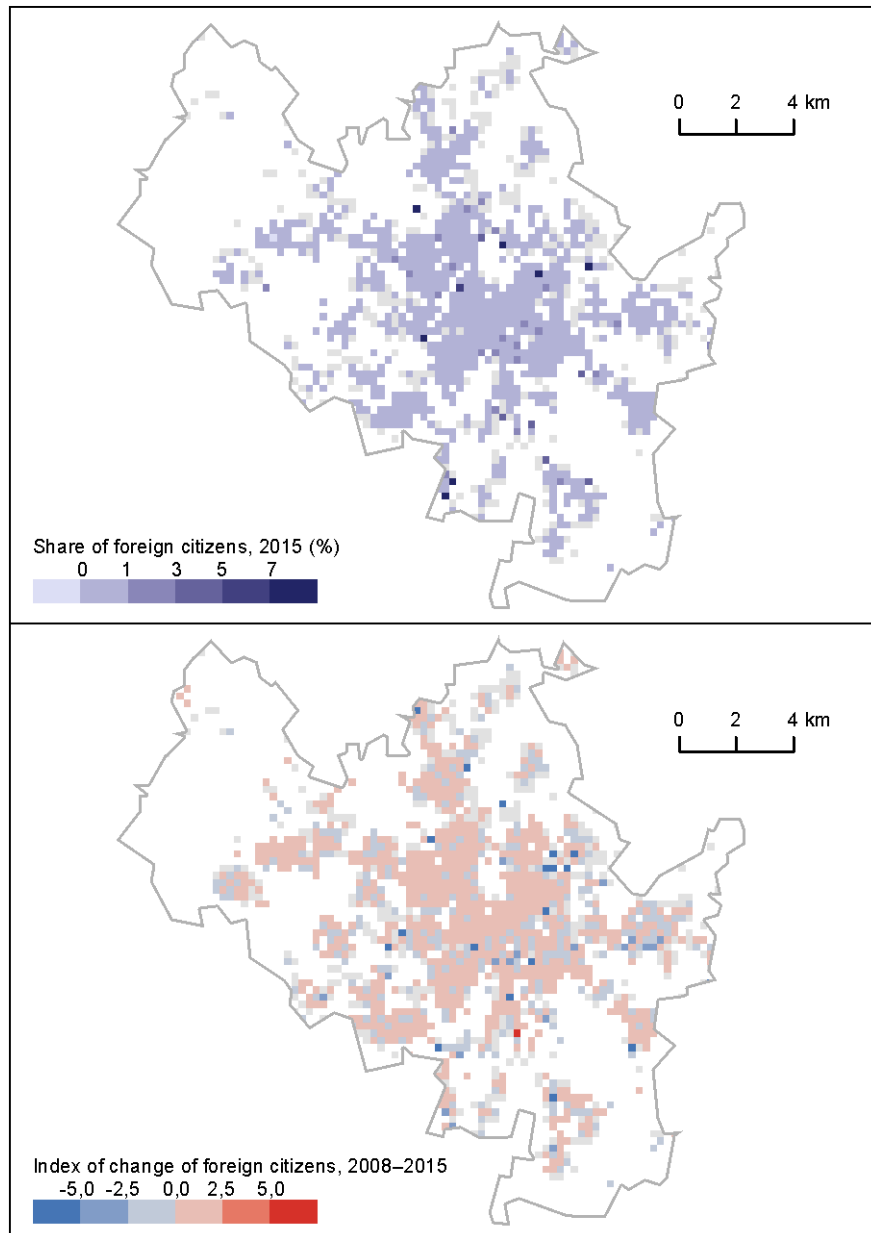
differences in the size and shape of spatial units influences the value of segregation indices (Wong, Lasus and Falk 1999) and limits the comparative research of segregation. For these reasons, patterns and trajectories of the segregation of new immigrants and their differences between cities in Czechia remain a gap to be filled. The overall descriptive analysis at city level needs to be supplemented by studies of the social and spatial mobility processes creating neighbourhood change, which are enabled by register data and further complemented by the qualitative research of segregation mechanisms. City-level analysis – including this study which combines three measures to explore segregation development across cities and a previous study by Šimon, Křížková and Klsák (2020) using one segregation metric to explore group differences and the scale effects of segregation – are initial steps in that direction.

## Data and methods

The current study introduces a new data source enabling the longitudinal analysis of ethnic residential segregation in Czechia. The database provided by the Foreign Police of the Czech Republic contains geo-coded information on all foreign citizens with registered residence<sup>4</sup> in Czechia between 2008 and 2015. The data on the Czech population are based on the official housing registry of the Czech Statistical Office, where information about the number of foreign citizens is subtracted from the total population to obtain the number of Czech citizens. The anonymised population data were aggregated to grid squares covering the whole territory of the 14 cities analysed here (see Figure 1). The median value of the population in a grid cell ranges from 28 to 108 (the average population from 104 to 289) for the cities. The grid square size of 250m ensures the anonymity of residents while improving the validity of the segregation measurement considerably.

Moreover, the use of grid data reduces discrepancies stemming from the use of pre-determined administrative units that often involve a great variability in the number and size of units (the Modifiable Area Unit Problem – MAUP), which has been a major obstacle in comparing the results of segregation studies across regions and countries (Andersson *et al.* 2018; Openshaw 1984).

To measure the two key dimensions of residential segregation (Massey and Denton 1988), we employ two widely used indexes recommended by Reardon and O'Sullivan (2004): the index of isolation as a measure of exposure and the index of dissimilarity as an indicator of spatial evenness between the minority group (foreign citizens registered to reside in the selected Czech cities) and the majority population (Czech citizens).<sup>5</sup>

**Figure 1. Population grid for segregation measurement – example of Brno**

Note: This figure serves as an illustration of the spatial grid used in our segregation analyses. The grid square size is 250m.

Source: Ministry of the Interior (2017), own elaboration.

The dissimilarity index measures differences in the relative group presence for the two groups and shows how different the share of the minority population in each neighbourhood is from the share of the minority population in the whole city. The outcome of such a measurement is an aggregate-level description of the unevenness of distribution. Strictly speaking, the index indicates possible consequences stemming from the unevenness of distribution but it neither reports on processes of segregation nor informs on changes at the individual or household levels. The index of dissimilarity ( $D$ ) is computed according to the formula (1), where  $e_i$  denotes the size of the minority population living in neighbourhood  $i$ ,  $ne_i$  denotes the size of the majority population living there,  $E$  denotes the total size of the minority population and  $NE$  the total size of the majority population in the city.

(1)

$$D = 100 * \frac{1}{2} * \sum_{i=1}^N \left| \frac{e_i}{E} - \frac{ne_i}{NE} \right|$$

The isolation index measures the probability of interaction with a member of a different group – i.e., how likely a minority group member is to interact with the majority if interaction between groups reflects only their neighbourhood presence. The isolation index is dependent both on spatial distribution and on the proportions of the minority and the majority. The lowest values of the isolation index occur when both groups are of equal size and are evenly distributed in neighbourhoods. Contrary to this, the highest values of the isolation index occur when the minority group is small and only located in one neighbourhood. The index of isolation (P) is computed according to the formula (2), where  $e_i$  denotes the size of the minority population living in neighbourhood  $i$ ,  $E$  denotes the size of the minority population in the city and  $f_i$  the total size of the population of neighbourhood  $i$ .

(2)

$$P = 100 * \sum_{i=1}^N \left( \frac{e_i}{E} * \frac{e_i}{f_i} \right)$$

Therefore, exposure (measured by the isolation index) can be interpreted as the extent to which individuals are exposed to members of their own group, whilst evenness (measured by the dissimilarity index) can be understood as the proportion of minority members who would have to move to achieve an even distribution. The two measures tend to be highly correlated but, in extreme cases, the isolation index can be high in an area with low levels of segregation as measured by the dissimilarity index and *vice versa*. Given the indices' calculation, the isolation index is more sensitive to group size than the dissimilarity index (Hess 2020)<sup>6</sup>. We therefore refrain from assessing the segregation of ethnic subgroups, although we acknowledge the different spatial behaviour of immigrants coming from different regions that was observed in other studies (Šimon, Křížková and Klsák 2020).

The trajectories of residential segregation are measured for the period from 2008 to 2015, which is further broken down into two shorter periods that had specific impacts on immigration to the country: the crisis (2008–2011) and post-crisis regrowth (2011–2015, see Křížková and Ouředníček (2020) for a similar delimitation). The trajectories are captured by the change in indices of dissimilarity (D) and of isolation (P) for each city. The analysed set of cities includes Prague – the Czech capital – and 13 regional cities, the largest one in each self-governed administrative district of the country. The cities were delimited using their administrative boundaries. Thus, suburban municipalities beyond the city borders were not considered.

## Results

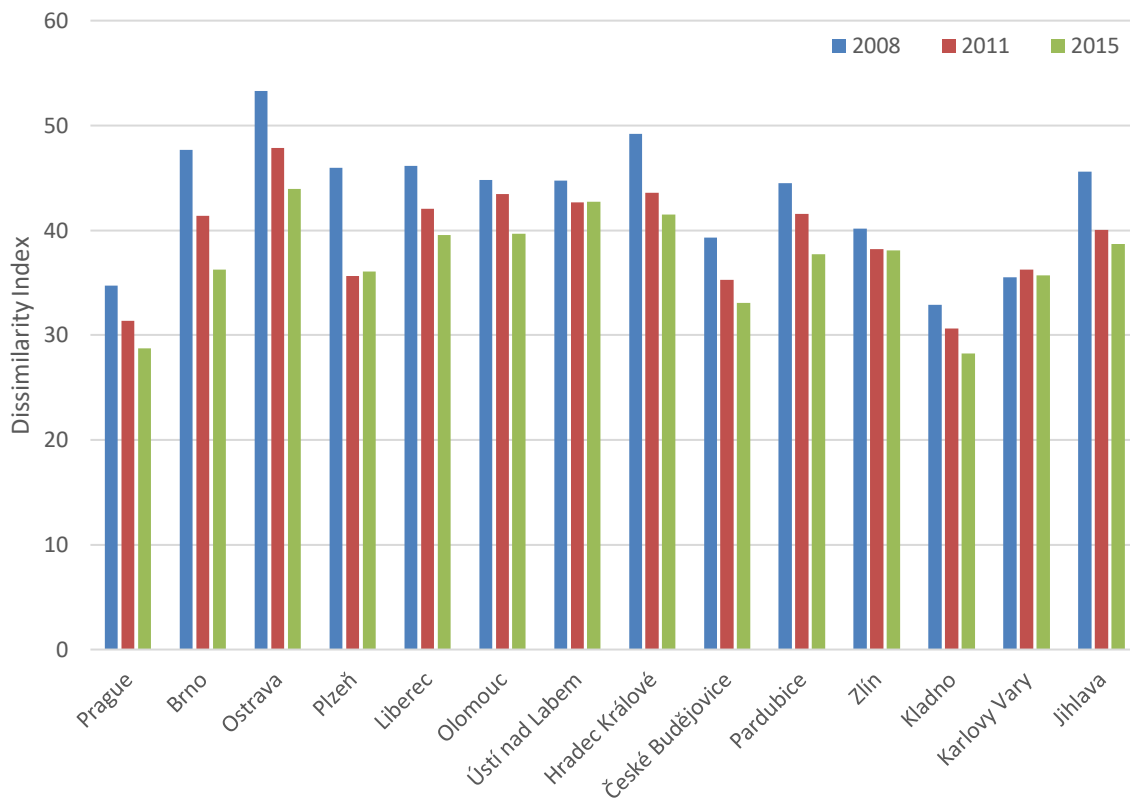
### *Index of dissimilarity*

First, we analysed the overall level of spatial dissimilarity between the minority (immigrants) and the majority population. Figure 2 shows that the level of dissimilarity is considerably lower in the capital city of Prague and in Kladno, which is a part of the larger Prague metropolitan area, as opposed to the other large cities. The dissimilarity-index values indicate that, in Prague and Kladno, around 30 per cent



of the population would have to move in order to achieve an equal spatial distribution, whilst this percentage is on average between 35 and 53 in the other large Czech cities.

**Figure 2. Dissimilarity Index for all immigrants in Czech cities in 2008, 2011 and 2015**



Note: Cities are sorted according to population size from largest (left) to smallest (right).

Source: Ministry of the Interior (2017), own elaboration.

Second, we looked at the dynamics of immigrant dissimilarity from 2008 to 2015. The main finding here is that the dissimilarity index decreased between 2008 and 2015 across the selected large Czech cities. The only exception from this trend is Karlovy Vary, a spa city with a long history of internationalisation and a large share of the immigrant population. The development of Russian minority in Karlovy Vary could have been influenced by the Russian aggression in Ukraine in 2014 (Klsák 2020).

The intensity of the decline in segregation differs considerably, nevertheless, between cities. The larger second-tier cities such as Brno, Plzeň and Ostrava experienced a faster pace of desegregation than was observed in Prague (Figure 2). Conversely, desegregation was much slower in smaller second-tier cities. For example, a slower pace of desegregation was observed in Ústí nad Labem and in Zlín, cities peripheral in both the economic and the geographical sense. These findings suggest that cities closest to the top of the urban hierarchy adopt the trends occurring in the capital city more rapidly than the peripheral ones.

Importantly, the level of segregation decreased more rapidly in the economic crisis period of 2008–2011 – when volumes of immigration to Czechia were smaller – and decreased more slowly in the period 2011–2015, when economy recovered and immigration started to intensify again (Kurkin, Němečková and Štyglerová 2020). Thus, the changes in the dissimilarity index as a measure of the unevenness of spatial distribution cannot be attributed only to growing numbers of immigrants (Table 1) but also to actual residential changes.

Since the values of the dissimilarity index can be biased if the share of a minority group is small (Voas and Williamson 2000), we also measured spatial evenness by an alternative indicator – the entropy index. The results, however, are generally consistent with our results for the dissimilarity index. We therefore only present the details on the calculation of the entropy index and its empirical results for the selected Czech cities in Appendix 1.

### *Index of isolation*

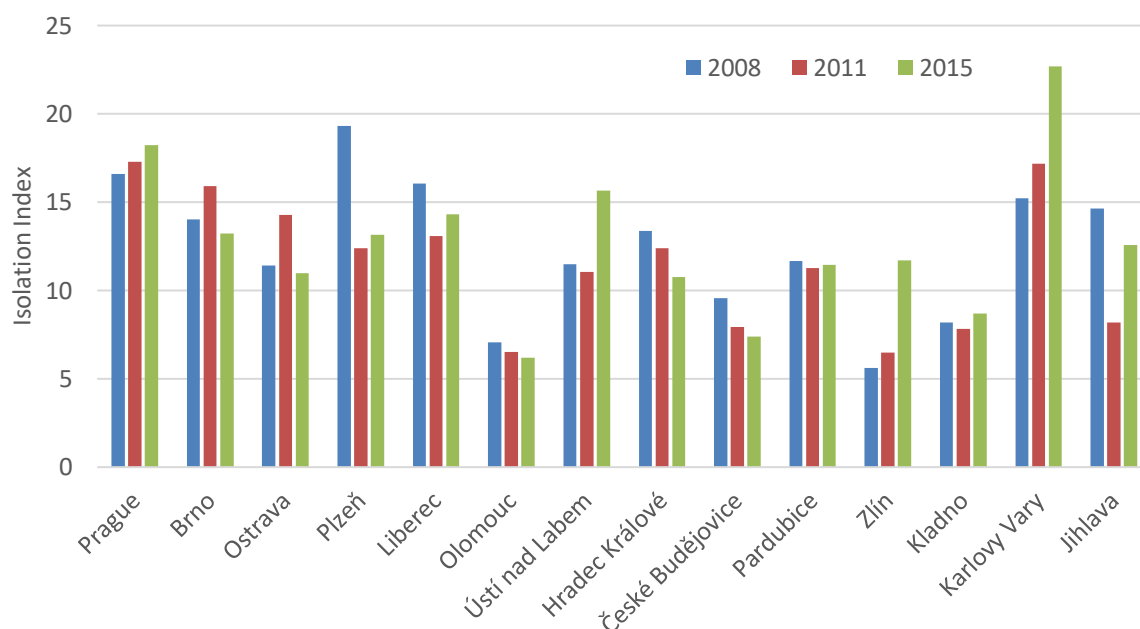
Contrary to the relative uniformity in the values and development of the dissimilarity index, there was greater variability in the spatial isolation of immigrants in large Czech cities in 2008–2015 (Figure 2). The average exposure of foreign citizens to other foreigners ranged between 6.6 and 18.4 per cent. The highest values were observed in Prague and Karlovy Vary, cities which also feature the highest proportion of foreigners in the population. Although the isolation index and the proportion of foreigners in the population are quite strongly correlated (Pearson  $R^2 = 0.8$ ), the isolation-index values were also rather high in certain cities (e.g. Ostrava, Jihlava) with relatively few immigrants in the population.

The development of the isolation index between 2008 and 2015 was also far from uniform. While foreign citizens became more exposed to other immigrants in some cities over time than they were at the onset of the economic crisis, they became less so elsewhere. Regardless of the magnitude of change, most (nine) cities witnessed a decrease in the isolation index from 2008 to 2015 as opposed to five others where the isolation index increased. However, the change in many cities was almost negligible. A more substantial change – by more than 10 per cent – was recorded in just eight cities: three where the isolation index increased and five where it decreased. A substantial increase was observed in three cities (Zlín, Karlovy Vary and Ústí nad Labem), which differ in size, the proportion of immigrants in the city population as well as in the percentage change of growth in the immigrant population between 2008 and 2015. Similarly, the set of five cities where the isolation index decreased quite considerably (Plzeň, České Budějovice, Hradec Králové, Jihlava, Olomouc) is very diverse in terms of their immigrant share and growth and in city size.

Furthermore, the developmental trend is without a clear tendency to increase or decrease in the two partial periods – the immediate years following the crisis (2008–2011) as well as the period of new growth (2011–2015). Figure 3 indicates that the isolation-index values changed considerably across the periods and cities with a variable immigrant structure and dynamics. However, the values and dynamics of the isolation index allow us to delimit three groups of large Czech cities with specific characteristics. First, the main immigrant gateway cities of Prague and Karlovy Vary constantly show high isolation-index values and a growing immigrant isolation throughout 2008–2011–2015. The second group, consisting of Olomouc, České Budějovice, Zlín and Kladno, scores the lowest isolation-index values and shows its decrease in the crisis period, followed by an increase in the regrowth period. However, the general trend in isolation-index change from 2008 to 2015 in this group was an increase in immigrant isolation (though this is probably driven by the substantial increase in Zlín, as the values for Olomouc and České Budějovice declined). The remaining eight cities form a third cluster with moderate isolation-index values

and a trend to decrease in 2008–2011 followed by an increase in 2011–2015. Nevertheless, the overall tendency in this group was towards a decrease in the isolation index between 2008 and 2015.

**Figure 3. Isolation Index for all immigrants in Czech cities in 2008, 2011 and 2015**



Note: Cities are sorted according to population size from largest (left) to smallest (right).

Source: Ministry of the Interior (2017), own elaboration.

While the levels of immigrant isolation seem to relate to the overall proportion of immigrants in the local population, the differentiated dynamics in city groups can partly be explained by the extent of support which each city offers to immigrants. While the first cluster mentioned above witnessed a growing number of immigrants, including those with temporary residence permits, in 2008–2011 the second group was mostly typical, with a decline in temporarily resident immigrants. Although some immigrants with temporary residence permits left the country, some could have moved from foreigner-sparse cities to immigrant gateways with a more-resilient labour market. In the latter, they were more likely to find the support of fellow immigrants and a greater choice of work opportunities (Horáková 2010), infrastructure and services like immigrant counselling. This flow could have contributed to an increased isolation in both groups of cities. In immigrant-scarce cities, the minority population declined, increasing the likelihood of them being segregated, as a small population can naturally only reside in a limited number of places. In the migration gateways, the newcomers could have joined the pre-existing immigrant clusters, thus increasing their exposure to their fellow immigrants. The continued growth in the isolation index in the main immigrant gateway cities might be due to the time lag whereby migrants react to the economic conditions with some delay.

### **Discussion: the nature of segregation in CEE compared to Western European cities**

Hoping to provide the first study of systematic quantitative research into the ethnic residential segregation of new minorities (immigrants) using register data in Central and Eastern Europe, this article

enables the comparison of segregation in Czechia as a CEE case with segregation in immigrant-destination countries in Europe. Although the overall trend towards desegregation across the Czech urban context appears robust, its interpretation must remain both cautious and preliminary. First, the early stage of the immigration process allows only a limited interpretation of the data. Current ethnic spatial patterns reflect, to some extent, the initial residential choice of immigrants and its change is limited in the Czech super-housing-ownership society with a limited renting sector (Stephens, Lux and Sunega 2015). Initial residential choices are probably informed by a different set of heuristics and economic resources than subsequent residential mobility. Thus, patterns of segregation are not fully crystallised as yet. Second, the city-level measurement using segregation indices is a-spatial – based on aggregated indices – and thus limits our insight into the individual-level processes of social mobility and residential attainment. Such process-focused studies aimed at assessing the exact mechanism of segregation have not yet been conducted (Šimon *et al.* 2020). Third, urban diversity and multiculturalism are not foundational cornerstones of policy narratives and frameworks in Czech cities (cf. Raco and Kesten 2018; Raco and Tasan-Kok 2019). Instead, the lack of a social-housing law and the crisis of housing availability dominate the policy discourse in Czechia. The housing policy of cities is focused on the socially excluded Czech population and immigrants are usually not eligible for municipal housing. Thus, the places of poverty of the majority population and of immigrants do not necessarily overlap.

The results of our study show that the evenness in the immigrant spatial distribution in Czech cities resembles closely that in other European cities. The dissimilarity-index values observed in large Czech cities ranged between 30 and 50 per cent, similar to the values calculated for Italian and Spanish cities by Benassi, Iglesias-Pascual and Salvati (2020) and slightly lower than in some Western European, e.g. British, cities (Benassi, Corrado, Frank, Fabio 2020). Despite the structural differences between CEE and Western Europe, ethnic residential segregation seems to unfold in similar ways in both regions. Segregation levels, notably that of dissimilarity, for the immigrant population are similar, as are their predominant dynamics towards desegregation. Thus, development in time towards desegregation in Czech cities, expected by spatial assimilation theory, seems to be more relevant in this study than factors explaining the persistence of immigrant clusters and the diverse dynamics of segregation like ethnic preference or public policies. Although spatial assimilation theory is currently an apt theoretical framework for explaining the general desegregation trend in Czech cities, stratification frameworks and individual preferences apply simultaneously in shaping the segregation outcome in the local context.

Furthermore, the differences in ethnic segregation between city sizes seem to be in line with previous studies. The index of dissimilarity tends to be lower in the largest metropolitan areas as opposed to the smaller urban areas, which is the case in most of the Western European countries analysed by Benassi *et al.* (2020). In Belgium and Sweden, the index of isolation tends to be greatest in the largest capital cities (Imeraj, Willaert and de Valk 2018; Östh, Clark and Malmberg 2015). We argue, however, that this result is highly dependent on the proportion of the minority population examined and its position on the labour market. Group size plays an important role in the resulting values of the isolation index (Hess 2020; Lan, Kandt and Longley 2020). The share of immigrants in Czech cities is proportional to the attractiveness of a particular metropolitan labour market, with Prague having the highest number and largest share of immigrants.

The dynamics of ethnic segregation following a crisis period were examined in several countries. A decrease in the dissimilarity index was identified across selected immigrant gateways of England and Wales between 2008 and 2015 for most ethnic groups (Lan *et al.* 2020). In the Amsterdam metropolitan region, a moderate drop in the dissimilarity index was observed in the 2009–2014 period for non-European migrants (Sleutjes, Ooijevaar and de Valk 2019). This article shows a decrease in segregation in

Czech cities after 2008. This suggests that an economic downturn does not have to be associated with an increase in immigrant unevenness. However, our results indicate that the picture is less clear in the case of immigrant isolation, the dynamics of which were more diverse and perhaps indeed related to current economic conditions. This tentative statement, however, needs to be supported by further analyses that control for the different sizes of immigrant groups within cities. One explanation for the opposite result can be the variegated behaviour of the individual minority groups in Czechia. Some migrants, arguably the most vulnerable ones who lost their jobs and lacked kin and community support, left the country, which contributed to a decrease in spatial inequality between the minority and the majority. Those who found support from family and the immigrant community could have temporarily increased their spatial isolation by joining other fellow immigrants in the main gateway cities.

This Czech study represents a case from CEE; however, it is questionable whether its findings are typical for this region. First, because Czechia is one of the main immigration countries in the region and is likely to feature greater proportions of immigrants in urban populations than cities elsewhere in CEE. Population stagnation and restrictive immigration policies typical of many CEE countries prioritise processes of urban change that do not include a strong immigration dimension. Secondly, previous research has shown that the post-socialist urban transition can result in highly heterogeneous patterns of local transformation, even within countries with a shared history (Malý *et al.* 2020). The cities in the CEE region share a common socialist past but faced rather variable challenges and fortunes shaping its social structure, built environment and governance in recent multiple transformations. Thus, the results presented here should not be generalised uncritically to the whole CEE region but are intended to open up a debate on ethnic segregation and its causes and consequences there.

The approach used in this article has methodological caveats that may have impacted on the comparison between countries and cities to some extent. Firstly, individual grid squares do not respect natural boundaries such as areas divided by rivers. Grid squares are as arbitrary as administrative boundaries and their use does not allow the avoidance of MAUP entirely. However, our robustness tests yield similar results when using differently sized grids, therefore they should not be biased by the geography used here. Secondly, using grid squares of equal area across the selected cities results in different numbers of grid squares in each city (Table 1) and in different numbers of the total population in each grid square. This should not harm our results either, as we use indicators that consider population proportions rather than absolute numbers. Thirdly, we acknowledge that using alternative units of segregation measurement such as individualised neighbourhoods would be more precise. Yet our more detailed analyses using different units are consistent with the results presented in this exploratory study.

The interpretation of residential segregation measurement is context-dependent in multiple ways, although the practice can use the same methods and same units of analysis in different contexts. First, the measurement and categories of analysis are context-dependent. For example, the risk of MAUP is more likely to matter in conditions of extreme segregation, where there are sharp block or neighbourhood boundaries, such as in US cities. In contrast, there are no sharp ethnic boundaries between neighbourhoods or city blocks with a predominantly ethnic population in Czech cities, where no legacy of racial zoning is present. Conversely, issues of group-size effects are more likely to matter in the CEE context, where new minorities are still relatively few in comparison to those in traditional immigration countries. Secondly, the social role of residential segregation in a neighbourhood and in a society is context-dependent. Institutional settings, the presence of public infrastructures, the perceived valuation of space and other localised factors shape the outcome of residential segregation and its impact (or a lack thereof) on everyday lives.

## Concluding remarks

To bring evidence on ethnic segregation beyond the traditional research areas – i.e. the largest cities in established immigration countries – this article has explored residential segregation in the Czech urban context in the years following the economic crisis of 2008. Building on newly available register data and measures of segregation using a detailed spatial grid, this article contributes to the literature on the impacts of an economic downturn on migrant populations. While the impact on individuals and countries was highly debated – see e.g. Beets and Willekens (2009), Leontiyeva (2014) and Tilly (2011) – the literature on the consequences of economic crises for the spatial distribution of immigrant populations is surprisingly scarce.

Our first research question focused on ethnic residential segregation across Czech cities. According to our analysis, the proximity of the main metropolitan region seemed to be key distinguishing feature in the level of segregation, rather than city size. While spatial dissimilarity was the lowest in Prague, it was similar in a relatively small city that lies in its metropolitan region (Kladno) and higher in the largest second-tier cities. Furthermore, spatial isolation does not relate directly to city size but more to the proportion of immigrants there. Cities of varying sizes – e.g. Prague and Karlovy Vary – show similar levels of ethnic residential segregation. These findings highlight the importance of comparative analysis as suggested by the ordinary-cities approach (Robinson 2006).

Our second research question focused on segregation dynamics in the period 2008–2015. Interestingly, the segregation indicators of unevenness and exposure we used yielded complex patterns of population change with a decreasing trend towards spatial dissimilarity and isolation. Contrary to the expectations derived from the literature, we did not observe a general trend towards growing segregation at times of economic crisis. Immigrants as a vulnerable population are expected to be the most impacted on by an economic downturn (Andersson and Hedman 2016), which is believed to decrease their socio-economic status and, in turn, change their spatial distribution.

Although not without its limitations, this article hopes to serve as a springboard for further studies on ethnic residential segregation in Czechia and in Central and Eastern Europe. Such an undertaking would permit the enrichment of both urban and migration studies by evidence from a region which is gaining importance on the map of international migration.

## Notes

<sup>1</sup> Other dimensions of segregation proposed by Massey and Denton (1988) include concentration, centralisation and clustering. The two former dimensions are not assessed in this paper due to space limitations; the latter – clustering – is understood here, in line with Reardon and O’Sullivan (2004), to be the opposite of evenness.

<sup>2</sup> In the Czech case, an exception to this is the Vietnamese, whose migration originated in the bilateral agreements between the-then socialist countries in the 1950s (Martínková 2011). The connection between the countries, established earlier, serves as a springboard for further migrations in the present day. Contrary to this, migration from other countries that exchanged workers and students with Czechia during socialism decreased to a negligible level.

<sup>3</sup> The circularity of migration, a high labour activity and strategies of saving allow some minority groups in Czechia to keep substantial proportions of their earnings, producing a quite small economic distance between them and the majority population (Křížková and Šimon 2021; Janská, Pauknerová and Koropecská 2017).

<sup>4</sup> Unregistered foreign citizens such as citizens of EU countries who decide not to register, short-term migrants from third countries staying in the country for less than 90 days and undocumented migrants are not considered. The citizens of EU countries are obliged to report to the Czech authorities if their stay in the country is to exceed 30 days. Unless wishing to apply for a permanent residence permit, they are not liable to register for residence in Czechia. Only persons with either a temporary or a permanent residence permit are included in the database. This data source differs from that used in studies of other countries, which use data on race or country of birth to measure ethnic segregation.

<sup>5</sup> Fossett (2017) provides a comprehensive review of segregation measurement with a broad range of computational options. Notwithstanding the debate on the advantages and disadvantages of the indices, the measurement of urban segregation is far more complex, involving topics like identity group classification, MAUP and activity space, the framing of inequality and segregation discourse, the historical legacy and current power relations, links between group differences and individual-level attainment and several others (Ellen and Steil 2019; Krysan and Crowder 2017; Lloyd, Shuttleworth and Wong 2014; Musterd 2020).

<sup>6</sup> The computation of the adjusted index of isolation, which introduces a simple adjustment based on a minority proportion at city level (as in Johnston, Poulsen and Forrest 2005) provided highly similar results to the unadjusted version of the isolation index. Due to this high consistency, only an unadjusted index of isolation is presented here.

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## Conflict of interest statement

No conflict of interest was reported by the authors.

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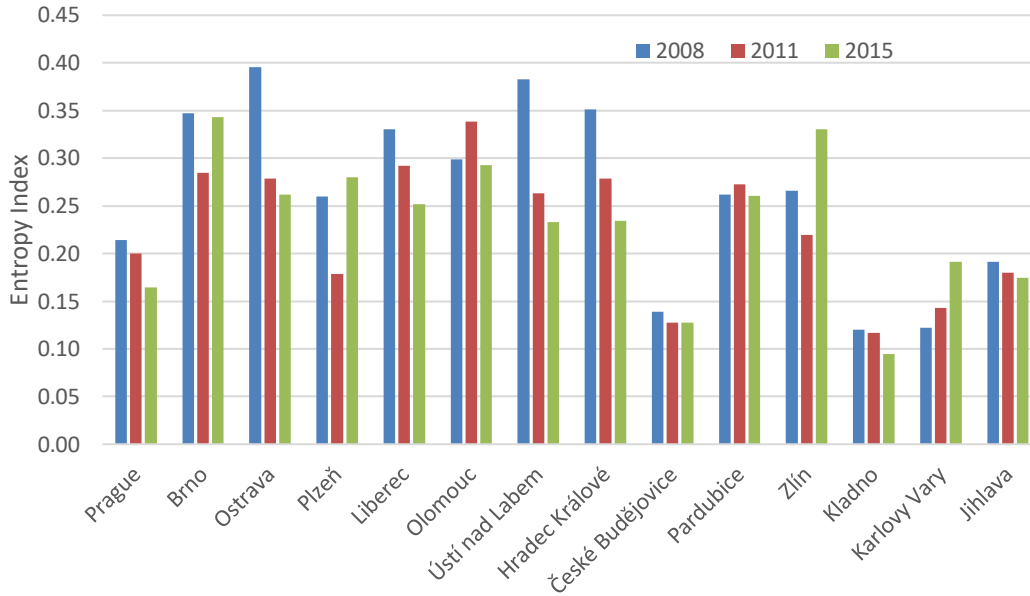
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## Appendix 1

**Figure 4. Entropy index for all immigrants in Czech cities in 2008, 2011 and 2015**



Note: Cities are ranked according to population size from largest (left) to smallest (right).

Source: Ministry of the Interior 2017, own elaboration.

The entropy index  $h$  for a neighbourhood is:

$$h_i = - \sum_{j=1} p_{ij} * \ln(p_{ij})$$

Where  $p_{ij}$  is a proportion of the population of  $j^{th}$  ethnicity in neighbourhood  $i$  ( $=n_{ij}/n_i$ );  $n_{ij}$  is the size of the population of  $j^{th}$  ethnicity in neighbourhood  $i$ ; and  $n_i$  is the total size of the population in neighbourhood  $i$ .

The entropy index of a city is then:

$$H = \frac{(\hat{H} - \bar{H})}{\hat{H}}$$

Where  $\hat{H}$  is the entropy index for the city as a whole and  $\bar{H}$  is the average of the individual neighbourhoods' values of  $h$ , weighted by population.

The values of the entropy index of a city ( $H$ ) range from 0 to 1. Cities with a uniform ethnic distribution have low values of  $H$  whereas cities with a less-uniform ethnic distribution have higher values of  $H$ .



# Polish Migrants in Ireland and Their Political (Dis)engagement in Transnational Space

Justyna Salamońska\*, Magdalena Lesińska\*, Weronika Kloc-Nowak\*

*Ireland has become one of the main destination countries for Polish migrants after Poland's EU accession in 2004. While much of the literature on Polish migration to Ireland post-2004 focuses on its labour-market element, in this paper we analyse the political participation of Polish migrants. We utilise data from a survey conducted by the Centre of Migration Research (University of Warsaw) with Polish migrants in Ireland which documents low levels of political engagement as measured by voting turnout in Polish presidential and parliamentary elections as well as the Irish local elections and elections to the European Parliament. A lack of knowledge about political participation rights or how to engage in voting is one explanation for the low levels of voting, especially in Irish local and European parliamentary elections. Another explanation may be the attitude that migrants have towards the political system and how they can influence it. Polish migrants predominantly report that they have no or little influence on politics in Poland and have relatively less trust in the authorities and politicians there (compared to Ireland). The key individual-level characteristic affecting Polish migrant respondents' electoral participation in Ireland is their (lack of) voting habit formed before migration.*

**Keywords:** political participation; Polish migrants; Ireland; transnationalism

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## Introduction

Ireland, since the enlargement of the European Union (EU) in 2004, has seen mass migration flows from Poland. The earlier economic boom in the country saw some inflow of Polish migrants but the numbers rose considerably after 2004 – even when the recession hit in 2008, Polish migration remained a permanent feature of Irish society. Nearly two decades after EU enlargement in 2004, we take a closer look at Polish migrants in Ireland to obtain data that will enable us to better understand their political engagement (or lack of it). We ask:

- To what extent are Polish migrants politically engaged and what is the focus of their political engagement (the country of origin, of destination or the EU, overlapping)?
- What are the main reasons for the political apathy of these Polish migrants, who are not active in the political sphere?
- Which individual characteristics are related to voting behaviour?

The literature on Polish migration to Ireland points primarily to the labour-market nature of this migration, with a plethora of family, educational and ‘just because’ motives present as well (Krings, Moriarty, Wickham, Bobek and Salamońska 2013; Luthra, Platt and Salamońska 2018). Polish migrants have mainly remained active on the Irish labour market, although they often earn less than native Irish workers and occupy positions well below their levels of qualification (Barrett and Duffy 2008; Barrett, McGuinness and O’Brien 2011). McGinnity, Privalko, Fahey, Enright and O’Brien (2020) found that, among EEA nationals in Ireland, Poles had one of the lowest probabilities of obtaining a highly skilled job. However, existing research reports low levels of discrimination against Poles in Ireland (Kingston, McGinnity and O’Connell 2015; McGinnity and Gijsberts 2016). While we are quite familiar with the labour element of this migration, Fanning, Kloc-Nowak and Lesińska (2020) point out that the political participation of Polish migrants has received less attention within scholarly research. We would like to fill this niche and explore the extent to which Polish migrants who are resident in Ireland engage politically, both in the destination country (see also Fanning and O’Boyle 2010; Fanning *et al.* 2020) and in Poland / the EU, by examining several dimensions of this engagement and the territorial levels of migrant participation.

Poles residing in Ireland have had several opportunities to vote in recent years. As far as voting in the country of origin is concerned, they are entitled to vote in Polish parliamentary and presidential elections. As residents in Ireland, they are also eligible to vote in Irish local elections. Additionally, as EU citizens, they can vote in European parliamentary elections. Apart from their voting behaviour, we are also interested more generally in the extent to which migrants declare any interest at all in politics and how they assess the political systems in the origin and destination countries, as these opinions may shed light on how they relate to politics more generally.

Thus our research on the political participation of Poles in Ireland draws on the work of Levitt and Glick Schiller (2004) as we apply a transnational lens in order to understand how migrants can simultaneously engage in the political systems of both their country of origin and that of destination. Depending on the relevant context of reference – the origin or the destination country – migrants may relate to and participate politically in their communities in different ways, with voting just one of the examples, as well as, *inter alia*, involvement in political parties, trade unions or civic participation (Doomernik, Kraler and Reichel 2010).

In the next section, we present a literature review which draws on existing studies on migrant political participation, highlighting the specific context of Ireland as the country of destination. We offer an overview of Polish migration to Ireland and the numbers involved and describe the main characteristics

of this migration. Next, we turn to data from the Centre of Migration Research (CMR) survey of Polish migrants in Ireland with regards to the latter's political participation. Analysis of these data paints a picture of limited political engagement by Polish migrants; we therefore also explore the reasons for this.

## Literature review

### *Migrants and political participation in transnational space*

Taking into account the dynamics of contemporary population movements in Europe and worldwide and the constantly growing number of migrants, the participation of migrants in political and public life is an important and current research topic. Analysing the participation process is crucial for understanding the broader socio-political processes in which migrants participate – i.e. their integration into the host society and the relationship between the state of residence and the country of origin.

In post-war Europe migrants have long been considered as passive individuals – short-term visitors engaged only in the workplace and receivers of social services and benefits – not as potential residents or future citizens (the guestworker system is the best example of such an approach). This situation was a result of the lack of legal opportunities (when foreigners did not have any political rights in the country of residence) and the widespread belief by the authorities that migrants are a temporary phenomenon. This perception has changed, together with migrants' settlement processes and the emergence of subsequent generations (Doomernik and Bruquetas-Callejo 2016; Martiniello 2006). The scope of rights related to long-term residence has expanded and the activities of migrants in the political and public sphere of the country of residence have also changed. Concepts such as denizenship, introduced by Thomas Hammar (1990), membership without citizenship and non-citizen members (Bauböck 1994) refer to the situation of migrants who are entitled to a certain catalogue of political rights based not on citizenship but on *ius domicili* (residence) in a given country.

In practice, migrants engage in more than one political community, maintaining a sense of belonging and undertaking activities in both the country of origin and the country of their current settlement. Therefore, within the literature on political participation, the concepts of transnationalism and transnational community – referring to the complex forms of belonging and activity of individuals and groups in this era of mass migration processes – have gained vast popularity (Bauböck and Faist 2010; Glick Schiller, Basch and Szanton Blanc 1992; Levitt and Jaworsky 2007). Political transnationalism, a concept which applies to political activities taking place in transnational space, has also gained in popularity. While Eva Østergaard-Nielsen (2003) described transnational political practices as actions taken by migrants concerning their country of origin, other authors postulate a broader interpretative framework and define political transnationalism as any political activity undertaken by persons residing abroad which is aimed at gaining political influence in the country either of residence or of origin (Martiniello and Lafleur 2008). Koopmans, Statham, Giugni and Passy (2005: 109) note that transnational migrants are able...

*...to establish ties that transcend national borders and, by crossing and re-crossing them physically, electronically and financially, they increasingly produce a transnational social, cultural, political and economic world (...). [they] do not leave their origins and pasts behind; they take them with them; and*

*by maintaining their networks, they begin to act as conduits between the two and more nations where they have connections.*

Yet maintaining civic ties and political activity in transnational space requires appropriate legal channels of participation, which are necessary for undertaking cross-border political actions (Chaudhary and Moss 2019).

In the literature there are many attempts to classify political participation. Authors distinguish between conventional and unconventional, state and non-state and low- and high-cost activities (related to the amount of time and resources an individual is forced to devote to a given form of participation) (de Rooij 2012; Zapata-Barrero, Gabrielli, Sanchez-Montijano and Jaulin 2013). Doomernik *et al.* (2010: 6) set out five dimensions of participation: voting behaviour; party membership, standing for elections and holding a political office; non-electoral political participation; involvement in trade unions and other interest groups; and civic participation (which is understood as membership in civil society and labelled as 'indirect political participation'). Among the different types of activism, voting in the elections is recognised as the conventional and most direct channel of political participation offering individuals the opportunity to influence the decision-making process. It is also considered to be a 'low-cost' type of political activity, as it does not require as much time, initiative and resources as, for example, involvement in a political party or demonstrating. Therefore, the assumption that voting should be the most common political activity performed by migrants seems justified. Victoria Finn (2020: 736) analysing migrant voting paths, proposed three types of active migrant voter (depending on the country in which they participate in the elections): immigrant, emigrant and dual transnational. While the first two categories occur when the migrant votes in only the country of settlement or of origin respectively, the dual transnational voter participates in elections in both countries. Interesting questions remain, however, about the relationship between migrant engagement in the country of origin and that in the host country (Tsuda 2012). When migrants perceive themselves to be discriminated against or marginalised in the country of residence, they may remain attached to the country of origin, be exclusively involved in homeland politics and be completely disinterested in political issues in the country of residence. This attitude, however, may change: together with time spent abroad, social mobility and integration, migrants could become more and more engaged in public and political life in the country where they actually live (Bevelander and Pendakur 2011). Some case studies confirm that it is a 'zero-sum relationship' when increased engagement in one country leads to decreased involvement in the other (Peltoniemi 2018).

Marco Martiniello (2006) distinguished several dimensions in the process of migrants' integration in the host community, pointing out that the participatory dimension (which includes the processes of mobilisation, participation and representation) is the highest element of this process. The other dimensions mentioned by Martiniello are the legal (the scope of rights granted by the state of residence) and identity dimensions (identification with the state and society of residence) and the adaptation of norms and values characteristic of a specific host community. Political engagement is also recognised by state governments as a major driver of integration. According to a recent Fundamental Rights Agency survey, most EU member states do not limit the access of migrants to membership of political parties and almost half give legally foreign residents both voting and election rights at the local level (FRA 2017). However, practice shows that granting electoral rights to migrants at the local level does not automatically translate into their mass participation in elections. The available data on the turnout of migrants, although very fragmented, indicates that its level is low (and far lower than the majority population) (Diehl and Blohm 2001; Doomernik *et al.* 2010; Fennema and Tillie 1999; Ruedin 2018). Huddleston (2009), Jones-Correa

(2001) and Togeby (1999) point to two groups of factors – institutional and individual – that may negatively affect the low turnout among migrants. Existing legal and institutional conditions for voting certainly have an important impact. It is obvious that the more restrictive the rules of participation in elections, the less likely migrants are to vote (Bauböck 2007: 2403–2407). Empirical studies support the claim that pre-election registration has a negative effect on voter turnout (Ansolabehere and Konisky 2006; Geys 2006).

The integration policy of the host state, which should result, *inter alia*, in greater knowledge of the political and voting system and the scope of rights applicable to migrants, also plays an important role (Diehl and Blohm 2001; Koopmans *et al.* 2005; Statham 1999). Some authors highlight a third group which may influence migrants' engagement – local-level factors such as local integration policies and the configuration of power within local authorities (Morales and Giugni 2011). Individual migrant characteristics are also related to voting behaviour or the abstention from voting. Young age, low level of education, unemployment and a lack of language proficiency all potentially decrease migrants' readiness to vote, while being employed, married and older increase it (for a more detailed overview, see Voicu and Comşa 2014). Research by Scuzzarello (2015) additionally suggests how political apathy may also be related to a limited – or lack of – knowledge of the political system in the country of residence (including information on political parties and candidates), a lack of knowledge about their own political rights and, more generally, a sheer lack of interest in politics. Along the idea of electoral turnout as a habit (Aldrich, Montgomery and Wood 2011), participation in voting after immigration has been analysed as being dependent on migrants' previous experience as voters. This is often analysed based on the comparison of the voting behaviour of newcomers from democratic and authoritarian countries of origin (Ferwerda, Finseraas and Bergh 2020; Wass, Blais, Morin-Chassé and Weide 2015) or from countries with different voting turnout levels (Voicu and Comşa 2014). This perspective links the individuals' behaviour with a macro level – that of the sending-state political culture.

### *Contextualising transnational political participation*

Polish citizens living in Ireland have the right to vote in parliamentary and presidential elections in Poland (in external electoral districts established abroad) and, as EU citizens, are eligible to vote in elections to the European Parliament. However, they have to choose either to vote for candidates standing in Poland or to participate in the election in Ireland and vote for candidates standing in that country. The choice of the second option requires earlier registration on the Irish electoral register. Such electoral registration is also necessary if they wish to exercise their right to vote as residents in Ireland, in local elections in the country. It is worth underlining, however, that the enfranchisement of foreign nationals has a long tradition in Ireland, where they have had the right to vote in local elections since 1963. The belief in the importance of the political inclusion of migrants is reflected in the eligibility voting rules for foreign nationals in Ireland, which are among the most liberal in Europe (see the MIPEX index: <https://www.mipex.eu/>). According to current regulations, all adults who are permanent residents of any nationality on a date when an electoral register comes into effect are eligible to both vote and stand in local elections. The only practical obstacle to becoming a voter seems to be a duty of personal registration on the electoral register in the district where they currently reside before the elections, which is not standard procedure in the Polish electoral system. This inclusive and active approach to the political engagement of foreigners is also reflected in the information and support campaigns aimed at providing an understanding of the political and party system, raising awareness of migrants' rights and information on the need to register and how to vote on election day. Actions of this kind have regularly been

arranged by a number of institutions – such as Dublin City Council, the Immigrant Council of Ireland or Forum Polonia – and supported by public funds (O’Boyle, Fanning and Di Bucchianico 2016; Sheridan 2019). The data speak for themselves: the number of migrant-origin candidates in local elections has been increasing steadily: from 6 in the 2004 elections to 56 in 2019 (Lima 2020), even if the respective number of candidates with Polish origin decreased (Pszczółkowska and Lesińska 2021). This increase in the number of migrant-origin candidates in local elections is obviously connected to the dynamic surge in immigration to Ireland, especially after the EU enlargements of 2004 and 2007; however, the impact of this inclusive legal and political opportunity structure existing in Ireland should not be neglected. The official data regarding the electoral participation of Polish migrants in Ireland are limited to elections in Poland and there are no available data on how many Poles residing in Ireland voted in local elections there or for Irish candidates in the European Parliament.

#### *Migration from Poland to Ireland – from newcomers to settlers*

Until the end of the twentieth century, only a small group of Poles lived in Ireland, among whom were post-World War II diaspora members who were offered places at Irish universities. In 1979, this group established the oldest Polish organisation in the country, the Irish–Polish Society.

At the beginning of the twenty-first century, Poles began to move to the Republic of Ireland in increasing numbers, using work permits. The census of April 2002 already showed 2,137 residents who had been born in Poland (CSO 2003). Between 2003 and 2014, Poles dominated among the registered immigrants – citizens of post-communist countries. The largest number of newly arrived Polish citizens was recorded in the Personal Public Service Number (PPSN) system in 2006, when 93,364 identification numbers were issued to them – some two-thirds of those assigned to newcomers from the new EU member states. As a result of the economic crisis, this number fell and stabilised for seven years at between 8,000 and 9,000 newly registered Poles per year (CSO 2020: Table FNA10). After the post-crisis wave of emigration and decline in the number of arrivals, the number of Poles in Ireland stabilised.

The 2016 population census in the Republic of Ireland recorded 115,161 people born in Poland. Interestingly, compared to the 2011 census, the size of this group did not really change as it was 115,193 people in 2011 (CSO 2017c: Table E7053). The population with Polish citizenship, including those born in the Republic of Ireland and having dual Polish and Irish citizenship, amounted to 131,788 people in 2016. Dual citizens recorded in the population census were mostly (6,530) persons born in Ireland (CSO 2017c: Table E7047). In addition, the scale of Poles naturalising in Ireland had been increasing: by 2019, 8,180 Polish citizens acquired an Irish passport (Eurostat 2021a). The number of people with exclusively Polish citizenship remained stable between the censuses: 122,585 in 2011 and 122,515 in 2016. They remain the most numerous group of foreign nationals in Ireland, exceeding by 19 per cent the second nationality – British citizens (CSO 2017a).

In 2016, more than half of Poles in Ireland aged 15+ were married or in a partnership, while the second most-numerous category (39 per cent) were single. The most common Polish households were those formed by couples (married and cohabiting) with children (46 per cent – an increase of 10 percentage points compared to 2011), followed by childless couples (14 per cent – a decrease of 5 percentage points) (CSO 2017c: Table E7024). These data indicate a progressive process of family formation and the appearance of offspring, which may be contributing to their permanent settlement and their higher interest in the quality of local infrastructure and services.

Poles in Ireland are relatively well educated, with 23 per cent of people having a university degree and 28 per cent having technical and vocational diplomas, according to the 2016 Irish census (CSO

2017a). The share of people of working age with tertiary education among Polish migrants was slightly below the figure for Poland (25.2 per cent) and much lower than among the population of Ireland (39.5 per cent) in 2016 (Eurostat 2021b). Due to the mainly economic nature of migration and the young age of the migrants, the labour-force participation rate among Poles is much higher (85 per cent) than among the general population of Ireland (61 per cent). Yet, the pattern of labour-market integration is highly gendered. Polish men have a lower unemployment rate than Irish men but, for Polish women, the unemployment rate (16 per cent) is higher than for native Irish women – and, indeed, all women on the Irish labour market (CSO 2017b: Table E7009). It is worth noting that the unemployment rate of Poles (13 per cent) is lower than that of all foreigners (15 per cent) in Ireland (CSO 2017a).

Already, in 2006, Poles could be found in every Irish municipality (CSO 2008: 28); they were also quite evenly dispersed according to the last census, in 2016, in which they constituted 2.6 per cent of the population of Ireland. With such a widespread population, Polish immigrants emerged, alongside the longer-established nationals from African countries, as a potentially important group of voters. Irish politicians noticed that Polish migrants were not politically indifferent – as proved by the approximately 22,000 who voted in the Polish general election of 2007; they were estimated to be around one third of the Polish population in Ireland (Fanning and O’Boyle 2010). In the period leading up to the 2009 local elections, the main political parties targeted Poles, publishing information materials in Polish, employing Poles as integration officers and recruiting Polish candidates. According to Fanning, Howard and O’Boyle (2010), parties were competing for immigrant candidates in areas with a high share of non-native population. Their high hopes regarding the Polish candidates and voters failed – not one of the Polish candidates was elected. The subsequent 2014 and 2019 local elections also brought no seat on the council for any of the Polish candidates. Hence the largest immigrant group in Ireland remains under-represented and *de facto* invisible in Irish politics – in contrast to other, less numerous, ethnic groups.

### Data and methods of analysis

This paper is based on data from a survey (CMR 2018) carried out within the research project entitled ‘Between Poland and Ireland. Political and Public Participation of Polish Migrants in Transnational Space’ (funded by the National Science Centre, No. 2015/18/M/HS5/00385). The survey covered issues such as Poles’ migration history, economic and family situation, socio-political activity and opinions on the quality of life in Poland and Ireland. An external market-research company implemented the fieldwork between June and October 2018. In total, 503 questionnaires were collected via computer-assisted personal interviews (CAPI). The interviews were carried out in the Polish language and their timing and location were recorded and controlled. Guidelines for recruitment capped the number of interviews per interviewer and per address to limit snowballing, ensure the diversity of the sample and limit interviewer bias. As Polish migrants in Ireland are free to settle and move without residence registration, it was impossible to obtain a base for random sampling. Instead, the sample was stratified by region and age, based on the Polish immigrant population structure in the 2016 Irish Population Census (CSO 2017c: Table E7003). In addition, we applied percentage quotas for gender, economic activity and employment sector, following the sampling criteria established for the biennial surveys of Polish migrants commissioned by the National Bank of Poland (Chmielewska, Dobroczek and Strzelecki 2018; Hołda, Saczuk, Strzelecki and Wyszynski 2011). Regionally specific quotas and interviewer restrictions gave the researchers considerable control over the fieldwork and seemed more independent from our research topics (including diasporic associational and political activity) than the potential alternatives such as a web-based survey with online recruitment via diaspora networks (cf. Nowosielski and Nowak

2020). Bearing in mind the impossibility of random sampling, we chose the best solution available, with the limitation that the data and results are not statistically representative for the Polish migrant population in Ireland.

The achieved survey sample included more economically active Poles than the statistics for the overall population of Poles in Ireland would suggest. The quota for the economically active in the survey sample was set at 75 per cent but the percentage achieved of those in employment was 95.8 per cent, in comparison to the Irish 2016 census in which 78 per cent of Poles in a corresponding age group (aged 25–64) were employed. The direction of the potential impact of this bias on our results in the analysed topic is difficult to determine. On the one hand, working people may be more inclined to abstain from voting due to working on a voting day or preferring to engage in leisure rather than voting in their free time. On the other hand, migrants in employment, displaying a degree of integration in the economic dimension, can also be more integrated politically compared to the underrepresented economically excluded ones.

The target group were Polish citizens resident in Ireland who arrived in the country between 1 January 2000 and 1 January 2014 (a period referring to their current stay in the country). Therefore, according to the criterion of the length of stay, we recruited both post-accession migrants (who arrived after the 2004 EU enlargement) and those who moved to Ireland in the period preceding Poland's EU accession, at the time of the economic boom in Ireland. Political and social integration take time; hence the researchers chose to focus on more-established Polish migrants in Ireland and to exclude the most recent arrivals. The sample included respondents who had the opportunity to vote in Ireland in local elections (at the time of the survey, the most recent local elections were held in 2014). Respondents had to have migrated to Ireland as adults.

The following analyses are based on the whole survey sample of 503 respondents. In this paper, we offer tabular, graphical and statistical summaries of information from the survey, along with multivariate logistic regression analyses. We present an overview of the socio-demographic characteristics of the sample and a picture of their political engagement, based on several variables measuring attitudes and behaviour. The logistic regression models take as dependent variables voting in Polish parliamentary, Irish local and European Parliament elections. Among the independent variables there are voting in Polish elections pre-migration (having voted at least once versus not having voted at all); interest in politics (binary variable referring to at least some interest in Polish, Irish local or European/world politics respectively versus not really and not at all interested); trust (in the Polish parliament, Irish local authorities, European Parliament respectively). For voting in Polish and Irish local elections, we included an independent variable about their belief that the political systems in Poland and in Ireland respectively allow people to have an influence on politics (categories included some-to-full influence and don't know; no influence was the reference category; there was no variable on influence on the political system in the European Union, so the model on voting in the European Parliament elections omitted this variable). We further control for age, gender, having a third-level education, length of residence in Ireland, plans for the future (distinguishing between plans to out-migrate, undefined plans versus plans to stay in Ireland), knowledge of the English language (very good versus all others) and size of the place of residence in Ireland. We wanted to test a set of hypotheses. First, we expected that people who voted before migrating would be more likely to vote in the destination country. We also hypothesised that an interest in politics would influence positively voting in elections. Further, we expected that trust in political systems would increase the likelihood that they would vote.

## The political participation of Poles resident in Ireland

### *The socio-demographic picture*

Let us focus first on a short overview of the sample before we turn to the analysis of political participation. The CMR sample respondents were relatively young (two-thirds were aged 39 and under), with an almost even distribution of males and females (49 and 51 per cent respectively). Because of the topic of the study, we were looking at more-established migrants. At the time of the study, just over half (54 per cent) of the respondents had been resident in Ireland for between four and seven years (only migrants resident in Ireland for at least four years were part of the sample). One fifth of the sample had been in Ireland for 12 years or more. The most numerous group had had a secondary vocational education (27 per cent). One quarter had received a vocational education and almost a fifth tertiary education. Only a minority continued their education in Ireland. The Polish migrants were fairly proficient in English, with 94 per cent declaring that they spoke English well or very well, even if the majority (80 per cent) mostly used Polish at home. The majority were married (53 per cent) and a further 18 per cent declared that they were in civil partnerships. In terms of geographical spread, around 60 per cent lived in Ireland in towns of up to 50,000 inhabitants, while Dublin attracted a considerable 15 per cent.

The most often it was the higher wages and ease of finding employment that made these migrants move to Ireland (rather than choose a different destination country). Indeed, for a large majority, migration to Ireland was linked to activity on the labour market: 94 per cent of the respondents declared work as their labour-market status. The economic situation of migrants in the destination country compared very favourably to that which they had left in Poland. While the majority (60 per cent) declared that they had difficulty in paying bills before migrating, at the time of the survey in Ireland it was only 8 per cent. Nine out of 10 admitted that, with migration, their economic situation had improved. Furthermore, 36 per cent reported having a house or apartment in Poland and 19 per cent in Ireland; however, possessing a property did not equate with plans to reside in the place where the property was based. Around 37 per cent of Poles in Ireland had no plans for the future. Almost 29 per cent of respondents wanted to stay in Ireland permanently and a further 29 per cent declared that they planned to stay for a limited period, ranging from 1 month to 20 years (the average declared length of stay was around 28.5 months, with the median equal to 12 months).

### *Migrants' interest in politics and their voting behaviour*

As the overview of the sample in the previous section argues, Polish migrants to Ireland were predominantly driven by labour-market motivations and remain active economically on the Irish labour market. We were interested to see whether they were also strongly engaged in local political life in Ireland and to explore the transnational dimension of their political engagement. In our study of Polish migrant political engagement we refer, where possible, to three levels of a geographical scale – regional, national (concerning the countries of both origin and destination) and supranational, which is the EU level. This approach allows us to situate the political engagement transnationally, in relation to migration reference points such as the country of origin, the country of destination and, more broadly, the EU. In relation to political engagement, we examine migrants' interest in politics and how they followed political developments within their social networks and via the media and voting.



So are economic migrants at all interested in politics? Based on the CMR survey, we were able to explore how our respondents assessed their interest in political events and to understand the local/regional, country and EU/global levels of this interest. We found that Polish migrants have a similar level of interest in politics, irrespective of the context, be that Poland, Ireland or the EU and the world (see Figure 1).

**Figure 1. Declared interest in political events at the local/regional, country and EU/global level (N=503)**



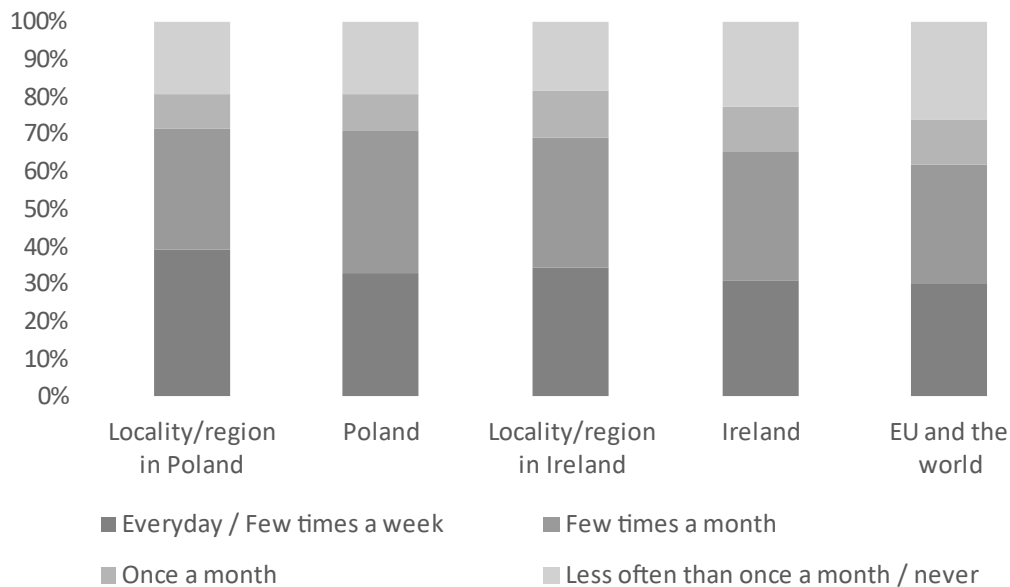
Source: CMR (2018).

When we dig deeper into this interest in politics, we see that it was also an experience shared on social networks, as respondents interested in politics at least to some extent also declared that they discussed political matters with family and/or friends and followed the media to learn about politics (see Figures 2 and 3). The respondents more often engaged in discussions about politics in Poland (at both the local and the national level, as declared by over 71 per cent of respondents) and about political developments in the local communities in which they lived in Ireland (69 per cent); less often they declared discussing EU/world developments, which was the case for around 62 per cent of interviewed migrants. The Polish migrants often followed media coverage about political events but, again, it was events in Poland (at the local and national levels) and locally in Ireland that they followed the most (around 80 per cent). Media consumption about Ireland was declared by 73 per cent, while the EU and world events in the media were followed by around 70 per cent of respondents.

There seems to be a fair interest in politics among Polish migrants but the key question is whether this interest translates into voting behaviour. The respondents in the CMR study were asked about their voting in Polish parliamentary/presidential elections, local elections in Ireland and elections to the European Parliament. For all the elections listed, only a minority reported casting a vote, although the percentages differed across the elections. One third of respondents voted in the Polish elections but only close to half of this group voted in all parliamentary/presidential elections in Poland while being resident in Ireland. The share of voters in European parliamentary and Irish local elections was close at just below 25 per cent. Again, less than half of them voted in all the elections while resident in Ireland. Among

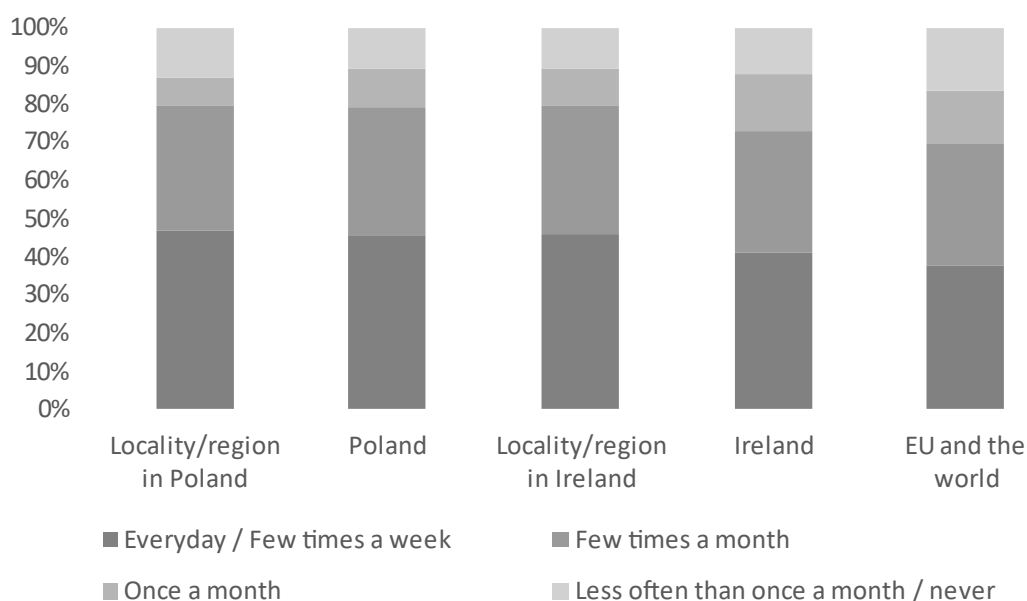
those who voted at least in one of the elections to the European Parliament, 44 per cent voted for candidates on the Polish lists only. A further 22 per cent voted for the candidates on both the Irish and the Polish lists (this applied only if a person participated in at least two European elections during their time in Ireland, as it is not possible to vote on both lists in any given election).

**Figure 2. Declared frequency of discussions with family or friends about political events at a local/regional, country and EU/global level (N=461)**



Source: CMR (2018).

**Figure 3. Declared frequency of media consumption about political events at the local/regional, country and EU/global level (N=461)**



Source: CMR (2018).

Taking into account migrants' possible engagement in Polish general elections, Irish local elections and European-level elections, we found that having voted (or not) in elections before migration divided migrants into two distinct groups who behaved differently once in Ireland. Those who had not voted in Poland were also passive after migration. Those who *had* voted in Poland were more prone to participate in elections in Ireland – regardless of whether they concerned the Polish national authorities, the Irish local authorities or the European Parliament; this reflects the notion of voter turnout as habitual behaviour (see Aldrich *et al.* 2011). Just over half of the respondents (51 per cent) declared that, before their emigration, they had participated at least once in elections in Poland (Table 1). People who had never voted in Poland before emigrating to Ireland usually also remained passive after migration. Those who had voted at least once in Poland took part in the elections of Polish state authorities while abroad a little more often than they ignored them.

**Table 1. The participation in Polish general elections of migrants in Ireland depending on earlier voting in Poland**

	Voting in elections post-migration							
	Polish elections		Irish local elections		European Parliament elections		Total	
	N	%	N	%	N	%	N	%
Voting in elections pre-migration	149	57.98	114	44.36	117	45.53	257	100
Not voting in elections pre-migration	17	6.91	9	3.66	8	3.25	246	100

Source: CMR (2018).

When we uncover the social composition of the voter group we find that, of those who voted in Polish, Irish local or European elections, the percentage with tertiary education and working in white-collar or skilled service jobs is higher than the sample average. Voters in Polish elections more often resided in a city of 50,000+ inhabitants or the capital than the sample average. Irish local elections, as well as European ones, more often attract voters from towns of up to 250,000 inhabitants.

**Table 2. Voting in elections while being resident in Ireland**

	Polish elections %	Irish local elections %	European Parliament elections %
Voted	33.00	24.45	24.85
Did not vote	67.00	75.55	75.15
Total	100.00	100.00	100.00

Source: CMR (2018).

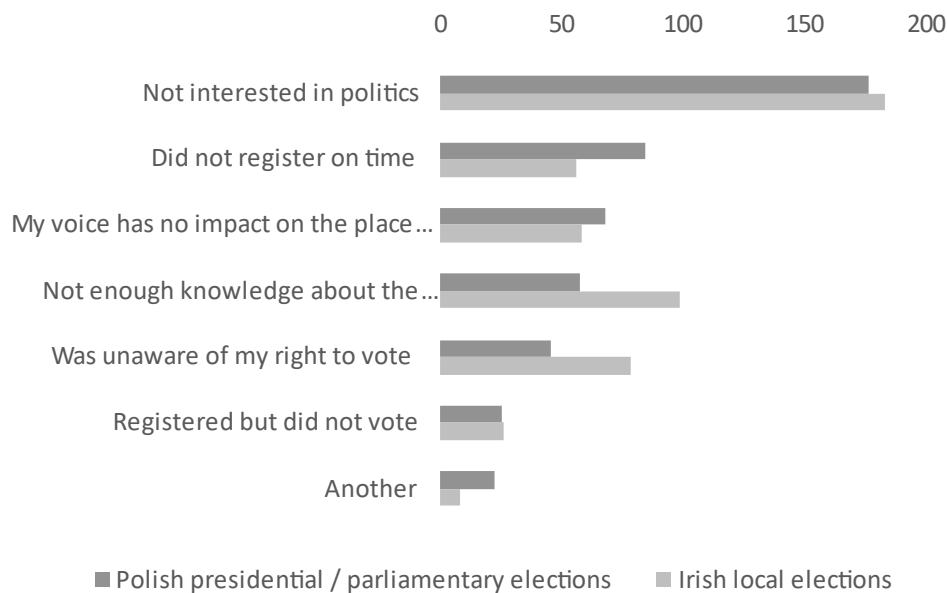
### *Exploring political disengagement, assessments of political systems and their institutions*

The majority of the CMR sample declared political disengagement to be measured by not voting in elections, with the percentages ranging from 67 per cent for Polish parliamentary and presidential elections to 75 per cent for local elections in Ireland and to the European Parliament. Because the majority of respondents did not vote, we now compare the reasons they gave for not taking part in the elections – reasons declared by respondents who missed at least one opportunity to vote while living abroad.

While it is clear that the majority did not vote in the elections, there are differences in the reported reasons why they did not (Figure 4) – they could choose up to two reasons explaining why they did not participate in (some) elections. For both the Irish and the Polish elections, many reported a lack of interest in politics. This finding to some extent contradicts the results reported in the previous sections about the declared interest in politics. It seems that, for some respondents who declared an interest in politics, it was not great enough to take part in or be related to the act of voting. Asked about the Polish elections, respondents claimed that they did not register on time and they did not think that their voice mattered for the place where they lived. Others also reported that they did not have enough knowledge about the elections and the candidates.

As for the Irish local elections, it seems that what accounted more for the respondents' lack of participation (apart from the absence of an interest in politics) was their lack of knowledge about the Irish context, including the elections, the candidates or the right to vote itself in the elections in Ireland. A smaller group (than in the case of the Polish elections) thought that their voice did not matter. Others simply did not register in time to take part.

**Figure 4. Reasons for not voting in the Polish presidential/parliamentary elections (N=425) and Irish local elections (N=443)**



In a bid to contextualise the political disengagement of Polish migrants across the whole spectrum of origin and destination countries and the EU, we turn to the attitudes of these migrants as they assess whether the political system allows people to influence politics. A considerable number of respondents did not know (or refused to answer the question) whether the political system allowed them to have any influence on politics in Poland and Ireland (12 and 17 per cent respectively). A higher share of respondents could not (or did not) answer the question on the Irish political system than could/did an analogous share of respondents about the Polish one, maybe because they were less familiar with and/or had no opinion on it. In both cases, those who did not answer this question tended not to vote.

When we exclude the 'don't know' answers (see Table 3), a majority of respondents claimed that they had no influence at all or only to a slight degree on the Polish political system. However, when they were

asked about their assessment of the Irish political system, the majority reported that it allowed people to have an influence (to some extent, a lot or a great deal).

**Table 3. Political system in the country allows people to have an influence on politics**

Influence on politics/country	Poland		Ireland	
	N	%	N	%
Not at all	87	19.68	36	8.61
Very little	157	35.52	124	29.67
Some	173	39.14	200	47.85
A lot	22	4.98	46	11.00
A great deal	3	0.68	12	2.87
Total	442	100.00	418	100.00

Source: CMR (2018).

Additionally, according to the CMR survey, there is a marked difference between the trust declared in the authorities and politicians in the countries of origin and destination and the European Parliament. In general, respondents displayed more trust in institutions and politicians in Ireland, with a top score for the local authorities. The European Parliament scored less than the Irish institutions but still above Polish local authorities, parliament and politicians, which came last in the level of trust reported (Table 4).

**Table 4. Trust in the authorities and in politicians**

Trust in...	Mean score	N
Local authorities in Ireland	5.25	465
Irish parliament	5.14	463
Irish politicians	5.13	465
European Parliament	4.84	468
Local authorities in Poland	4.48	469
Polish parliament	4.35	472
Polish politicians	4.19	471

Source: CMR (2018).

### *Learning about the voting patterns of Polish migrants – regression analyses*

To learn more about how the various individual characteristics relate to migrant voting behaviour we now turn to our multivariate analysis results. A set of binary logistic regression analyses, with voting in Polish, Irish local and European Parliament elections as dependent variables, points to how migrants have brought with them the baggage of voting behaviour from Poland, which largely impacts on their voting behaviour when resident in Ireland, in all election types. This independent variable has a statistically significant effect consistently across the three models (see Table 5). The interest in politics is another predictor of voting behaviour but only in the case of Polish and Irish local elections. Migrants expressing an interest in political events in Poland and locally in Ireland are more likely to vote in Polish and Irish local elections respectively, controlling for other variables. Similarly, trust in politics is statistically significant in favour of Irish local voting. People who declare not having plans for the future are less likely to participate in Irish local elections but this does not concern Polish elections. Older migrants

are more likely to be voters in Polish and Irish local elections, controlling for other variables in the model. The place of residence in Ireland mattered for voting in Polish elections, with people resident in Dublin being more likely to vote compared to the inhabitants of small towns and villages. This may be related to the accessibility in case of in-person voting as the voting booths were based in Dublin and larger cities across Ireland. However, in 2011 and 2015 it was also possible to cast a vote by post. Contrary to some previous studies (Doomernik *et al.* 2010; Koopmans *et al.* 2005), in our analysis the length of stay is not statistically significant but this may be linked to the fact that the survey sample included only people with at least four years of residence in Ireland.

**Table 5. Binary logistic regression models with dependent variables voting in 1) Polish; 2) Irish local; 3) European Parliament elections (reference: not voting in respective elections)**

	Voting in Polish elections			Voting in Irish local elections			Voting in European Parliament elections		
	Odds Ratio		Std. Err.	Odds Ratio		Std. Err.	Odds Ratio		Std. Err.
Voted pre-migration	17.984	***	6.027	19.591	***	8.892	38.986	***	19.309
Not interested in politics	0.417	**	0.124	0.374	**	0.141	1.081		0.330
Trust in political institutions	1.073		0.058	1.295	**	0.100	0.951		0.058
Declaring at least some influence on politics (ref: no influence)	0.786		0.442	0.840		0.372			
Does not know if has influence on politics (ref: no influence)	0.963		0.583	0.108	**	0.091			
Wish to leave Ireland (ref: wish to stay)	1.050		0.321	0.611		0.203	1.139		0.349
Does not have future plans (ref: wish to stay)	0.577		0.200	0.181	***	0.074	0.517		0.192
Knowing English less than very well	0.562	*	0.152	0.876		0.266	0.455	**	0.126
Age	1.041	*	0.019	1.062	**	0.024	1.013		0.021
Female (ref: male)	1.165		0.298	0.786		0.230	1.108		0.300
Third-level education	1.014		0.311	1.643		0.571	0.606		0.197
Residence length 4–5 years (ref: 10 years or more)	0.752		0.256	1.354		0.537	0.533		0.192
Residence length 6–9 years (ref: 10 years or more)	1.566		0.499	0.656		0.237	0.717		0.236
Residing in countryside (ref: Dublin)	0.237	*	0.159	0.477		0.387	0.508		0.376
Residing in town up to 50,000 inhabitants (ref: Dublin)	0.248	***	0.099	0.938		0.457	0.975		0.432
Residing in city 51,000–250,000 inhabitants (ref: Dublin)	0.570		0.255	1.775		0.966	1.673		0.849
Constant	0.063	**	0.058	0.003	***	0.004	0.040	**	0.043
N	467			460			463		
Pseudo R2	0.3335			0.3989			0.3217		

Notes: \*  $p < 0.05$ , \*\*  $p < 0.01$ , \*\*\*  $p < 0.001$ .

Source: CMR (2018).

The results of the regression analyses are, in general, consistent with the existing literature. The available research results indicate a relationship between electoral engagement and an interest in politics: migrants who are highly interested in politics are more likely to participate in elections in both countries – of settlement and of origin (Finn 2020; Peltoniemi 2018), which is also corroborated by our study. The importance of trust (social, in politics and institutions) is recognised as an important determinant of the political engagement of migrants in the country of residence (de Rooij 2012; Fenema and Tillie 1999); the case of Poles in Ireland also proved this connection in relation to the Irish local elections.

## Conclusions

This study has examined Polish migrants in Ireland and the extent to which they are politically engaged. We referred to the three possible levels of political engagement – origin country, destination country and the EU. The CMR survey results show clearly that the majority of migrants do not vote, irrespective of the type of election. Only a third of the migrants declared that they vote in Polish elections (presidential and parliamentary). Only a quarter voted in the Irish local elections and those to the European Parliament. However, those who voted while resident in Ireland had usually also done so prior to migrating. We also asked about the reasons behind their political disengagement and contextualised them through the attitudes that migrants have towards the political system in both the origin and the destination countries. A lack of knowledge of political participation rights or how to engage in voting is one explanation, especially with reference to Irish local elections. Another is the attitude that migrants take about the political system and the ways in which they can influence it. Polish migrants predominantly report that people have no or little influence on politics in Poland and have relatively less trust in the authorities and politicians there (compared to Ireland), which can discourage them from any engagement in the political sphere. Polish migrants may thus have brought with them to Ireland their attitude to the political system back in Poland and be unwilling or slow to change their views. This explanation complements earlier research on the political disengagement of Poles in Ireland, including that of Fanning, Howard and O'Boyle (2010), who hypothesised that the factors impeding the political participation of Poles were the relatively recent presence of Polish migration in Ireland. In contrast to the refugees and immigrants of African descent, Poles seemed to be less motivated to political activism due to their lack of experience of racism and the secure legal status of EU citizens. This is in line with the results of a study of Poles in Ireland who reported how they felt discriminated against much more rarely there than in, for example, Great Britain or Germany (McGinnity and Gijsberts 2016).

The regression results corroborated our hypothesis in relation to pre-migration voting and that it is positively related to voting in the destination country, irrespective of the election type. This was the only predictor which was statistically significant across all election types. Our survey data analysis examined voting behaviour in the country of origin and in the country of immigration on an individual level, which shed new light on the issue often analysed on the level of the country of origin's political regime (Wass *et al.* 2015) or voting turnout (Voicu and Comşa 2014), treated as a proxy for migrants' experience with democratic procedures prior to migration. The interest in politics was quite widespread among the respondents but regression analyses showed its effect only for voting in Polish and Irish local elections. Trust of political institutions was related only to voting in Irish local elections. As the Irish local authorities scored higher levels of trust among our respondents than any other political body, this might have motivated some voters to engage in elections specifically at the local level. Migrants who were undecided whether they wish to stay in Ireland or move were less likely to vote in Irish elections than those planning to stay in the country. A lack of clear plans for the future and a disengagement from

voting could both be symptoms of political apathy among intra-EU migrants who can migrate without barriers and keep their mobility options open without putting any legal effort into making their stay in the host country more permanent. Hence the overall voting rates among migrants remain low. The added value of our analyses is its focus on voting in the European Parliament elections, since many existing studies tend to examine political behaviour directed at origin and destination, while we offer a more comprehensive picture, including the European dimension of migrant political engagement.

When the recession hit Ireland in 2008, there were questions about the future of Polish labour migration to the country. It is clear now that many migrants stayed but, at the same time, continued their 'Polish migrant settlement without political integration' as Fanning *et al.* (2020) diagnosed it. The efforts of Irish political parties and Polish immigrant organisations to raise awareness and motivate Poles to vote had a limited effect. The Polish candidates in the local elections have been unsuccessful thus far and the scant participation of Polish voters partly contributed to these low figures.

While the data we analysed were collected in 2018, an interesting question to pursue in the more-recent context is to follow migrant political engagement in the light of the 2020 women's rights' protests in Poland. In this case, social media played a major role as a space in which Poles could protest (Muszel and Piotrowski 2020), and this could be a new and less institutionalised, more spontaneous avenue for research into the political participation of migrants too, at least those whose political interests are directed at the country of origin.

The political participation of Poles in Ireland may also be seen from a broader perspective. While 'new' EU citizens from Central and Eastern Europe seem to be well aware of their free-movement right to live and work in other EU countries and make use of this *en masse*, they seem to be much less knowledgeable about and active in terms of their political rights when on the move in the EU. This, of course, points to the shortcomings of European integration processes as they occur in everyday life.


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# Migration and Elderly Care Work in Italy: Three Stories of Romanian and Moldovan Care Workers

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*Italy is one of the most important destination countries for Romanians. At the same time, the Italian care sector relies mainly on migrant labour, most of whom are Romanian women. Historically, Italy is considered one of the landmark countries for the southern or Mediterranean welfare state, characterised by its fragmented labour market, underdeveloped social protection system, informal economy and unpaid care work, usually done by the women in the family. Italy has one of the highest rates in Europe of both the elderly population and life expectancy at birth. In the last 20 years, the care work was gradually redistributed to migrant care workers, most of them women from former socialist countries, who often live in the household where they work. Migration from Eastern Europe, particularly Romania, has been facilitated, on the one hand, by rising unemployment and low-paid job opportunities in migrants' countries of origin in the context of the deindustrialisation of state industry and, on the other, by the Italian elderly public-support system which is based on cash benefits granted to the family which can be redistributed to employ migrant care workers. In this paper we analyse three specific types of care work migration from Romania to Italy and the main challenges which they face, taking into account the specifics of the work and the type of migration chosen. The methodology is qualitative, based on 20 semi-structured online interviews with Romanian care workers and two interviews with stakeholders.*

**Keywords:** migration, migrant care workers, elderly care work, Mediterranean welfare state, Italy, Romania

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## Introduction

Historically, Italy has been one of the countries which encouraged the maintenance of care work within the family through its social policies. After the collapse of state socialism in Central and Eastern Europe and the subsequent neoliberal economic transformation that triggered massive unemployment, economic migration became one of the most important coping strategies for local populations. It made for favourable conditions for care work in Italy to be gradually redirected towards migrant workers from countries such as Poland, Ukraine and, most recently and most prominently, from Romania and Moldova. The re-commodification of care work was possible through favourable migration regimes in Europe (Lutz 2017) and because incomes and quality of life were much lower in Eastern European countries. This situation became widespread as economies deindustrialised through the privatisation of state-owned companies and the implementation of a type of capitalism which is specific to dependent market economies reliant on cheap labour (Nölke and Vliegenthart 2009). This is one of the main reasons why a large number of Romanians go to Italy and Austria to be care workers, as these countries offer larger salaries than does Romania.

According to a United Nations report (2017), approximately 3.4 million Romanians emigrated between 2007 and 2017, making up 17 per cent of the population – the second highest global rate of migration after that caused by the war in Syria. In Italy, Romanians are the largest minority. Compared to 2003 (there are no earlier data), the number of Romanians in Italy increased almost 13 times, with a constant annual growth rate – with the exception of 2012, when there was a small decline as a consequence of the global economic crisis. According to data from the Italian Institute of Statistics, approximately 1.2 million Romanians had an established residence in Italy in 2020, 57 per cent of them women.<sup>1</sup> Romanian women are, in fact, the largest group working in this field in Italy, care work being almost the exclusive domain of migrants (King-Dejardin 2019: 36). Care workers are one of the most vulnerable labour groups, especially as a large portion of them are informal workers, without registered contracts and without adequate social protection or having their rights guaranteed. At the global level, one in five people who practice domestic work are international migrants, a statute which makes them more vulnerable, as only 10 per cent of them are protected by labour legislation (ILO 2013).

An accelerated aging of the population and the influx of migrants coming to work from poorer countries are the two largest demographic phenomena specific to most countries in Western Europe. At the EU level, the population older than 65 years is expected to grow from 20 per cent of the total currently to 30 per cent by 2070, while the population older than 80 is expected to double and reach 13 per cent of the total.<sup>2</sup> At the same time, it is estimated that the population in need of long-term care will grow from 19.5 million in 2016 to 23.6 million in 2030 and 30.5 million in 2050. Italy is the European country with the oldest population. If, in 2000, the elderly in Italy represented 18 per cent of the total population, today that number has reached over 23 per cent (World Bank database, indicator SP.POP.65UP.TO.ZS). At the same time, between 1994 and 2011, the demand for care workers for the elderly quadrupled (Castagnone, Salis and Premazzi 2013) and this demand was covered by the informal or irregular work of hundreds of thousands of migrant women.

In the early 2000s, the Italian state tolerated irregular immigrant women who later obtained the right to stay following Decree 195/2002 for the amnesty of non-EU workers, known in the popular language as *Sanatoria*. The migration of Romanians (including for care work) has increased steadily since 2002 in the context of their being granted freedom of movement within the European Union even if the Italian labour market formally opened to migrants from Romania only in 2012. To facilitate their freedom of movement in the European Union, Moldovan citizens have obtained or regained Romanian citizenship,

generally using their Romanian passport when registering in destination countries (Cojocaru 2021). According to data from the National Institute for Social Security in Italy, the number of domestic workers registered there in 2018 was 849,987, approximately 90 per cent of them women.<sup>3</sup> Apart from these, there are also those who are not registered. According to the estimates of an employment agency in Italy, around 565,000 domestic workers do not have an employment contract<sup>4</sup> and do not benefit from any kind of social protection (accident insurance, health insurance, social security, pension insurance).

Using a qualitative methodology based on in-depth biographical interviews, this article aims to produce a classification of the main categories of Romanian care workers in Italy, together with the main challenges that they face, taking into account the specifics of the work and the type of migration chosen. With this goal in mind, we started from the two 'typical profiles' of Ukrainian migrants to Italy described by Vianello (2016), which we adapted in order to understand the situation in which migrant care workers from Romania find themselves. The exploratory research on which this paper is based is designed to provide a better understanding of the challenges faced by Romanian and Moldovan care workers in Italy. Although they represent the largest group in the care sector, their experiences are little researched in the literature. The analysis is helpful in understanding the diversity of care workers' experiences and the challenges of each type of employment. The main contribution of this paper is its discussion about seasonal care workers – who have become a considerably large group – being the most exposed to rights violations.

Although the emigration of women from Romania and, in particular, migration for care work, was among the most important social phenomena in the context of the post-socialist transition and the structural transformations taking place in the past 30 years, there are few studies which describe the migration and labour experiences of this occupational category. Furthermore, this professional category is virtually invisible in the Romanian public sphere and there is little known about the details of care work and the regulations in destination countries in this (often informal) sector. The only conversations which took place in the mainstream media were more about the phenomenon described by psychologists as the 'Italy syndrome',<sup>5</sup> acknowledging the mental-health problems and the psychological challenges experienced by an important proportion of those working in the care sector.<sup>6</sup>

### **The Italian welfare state model, circular migration and the nature of care work**

Over the past 30 years, the mechanisms through which long-term care is delivered changed in several countries in Europe. The literature in the field which analyses the typology of welfare states (liberal, social democrat, conservative corporatist and, eventually, southern or Mediterranean – Esping-Anderson 1990; Ferrera 1996) explains the institutional mechanisms through which states choose to produce welfare and social protection. Among the attributes of the southern model, there is the existence of a fragmented labour market and an underdeveloped social protection system (dependent on the level of regional development), a population employed in peripheral sectors or in the informal economy (especially women) and a tendency for care work to be unpaid and usually done by the family. Italy can be considered as one of the landmark countries for this type of welfare, where care work of the elderly and of children historically fell under the remit of the family and in particular of women. This is one of the main reasons why Italy has one of the lowest rates of employment among women and an important percentage of women working part-time. However, care work (especially of the elderly) was gradually redistributed to migrants, most of them women from former state-socialist countries, with no specific qualifications, who often live in the household in which they work. This phenomenon accentuated after 2000, not only because the population became older<sup>7</sup> and life expectancy at birth increased<sup>8</sup> but also



because the employment rate of women increased, especially as families transitioned to the dual-breadwinner model. At the same time, this regime of care production was also possible because the social protection system now focuses more on monetary social transfers for care that the family uses on social services (Bauer and Osterle 2013; Di Rosa, Melchiorre, Lucchetti and Lamura 2012; Tognetti and Or-naghi 2012). Public support for care in Italy continues to rely on several types of financial transfer. The most common is the 780-euro accompanying allowance (*indennità di accompagnamento*) which is received by more than 10 per cent of people over 65 years old who need an accompanying person for daily activities, without needing to justify in any way how they spend the money (King-Dejardin 2019). Moreover, irregular migration was tolerated and even encouraged by the Italian state (Ambrosini 2014). This is how the woman-in-the-family care model was gradually replaced by the migrant-in-the-family care model (Bettio, Simonazzi and Villa 2006; King-Dejardin 2019). This is the currently dominating care model: hired care workers, informally known as *badanti*<sup>9</sup> who often live in the same household as the beneficiaries, whom some studies call the ‘backbone’ of the Italian elderly-care system (Castagnone *et al.* 2013). The marketisation of care is also present in other European countries in the context of an aging population. For a valuable discussion of elderly-care models in Great Britain, Spain and France, see Sahraoui (2019), who argues that racialised or minority care workers play a crucial role in meeting the sector’s need for labour. According to the author, migrant women are at the highest risk of precarious employment in all three countries. However, the provision of care differs in terms of colonial history, patriarchal norms and the type of neoliberal regime (Sahraoui 2019).

Rugolotto, Larotonda and van der Geest (2017) argue that the migrant care workers solve a problem of Italian social services – ‘keeping alive’ the Mediterranean model which is based on the moral obligation of elderly ‘family care’. Not respecting this obligation is taboo; however, at the same time, the costs can be extremely high for all parties involved. The care workers and the elderly feel overworked and even exhausted by a difficult relationship, while the families are pressured by the cultural and moral obligation to offer care to parents and grandparents through the family. All three parties are interdependent (Rugolotto *et al.* 2017: 185). The institution of the *bandanti* became an integral part of the Italian family, producing ‘a less traumatic and perhaps more acceptable transition from informal to commodified care’ (Da Roit and Facchini 2010: 12, as cited in; Rugolotto *et al.* 2017: 193). As a consequence, (Romanian) migrants ‘help Italian families to remain Italian by following this tradition, or at least keeping up the appearance of doing so’ (Rugolotto *et al.* 2017: 194), working and playing a role that the family no longer plays directly but only manages (Ambrosini 2014; Pugliese 2011). The goal is to preserve the ‘traditional family’ but what remains ‘traditional’ in this configuration is the preservation of the gendered division of labour through which offering care in the family is the woman’s role (Lutz 2018; Pugliese 2011; Sahraoui 2019).

The result of the capitalist model implemented in Romania, predominantly relying on direct foreign investments, fiscal facilities for companies and cheap labour (Ban 2014; Nölke and Vliegenthart 2009; Pasti 2006) is unequal development, with significant differences between urban and rural areas as well as between regions. Even after joining the EU in 2007, Romania did not reach the level of development of Western countries, having one of the highest poverty and social exclusion rates, social and economic inequality, under-financed public health, education and social assistance systems and among the lowest average wages in Europe (Țoc 2018). In this context, labour migration or mobility – including circular and temporary migration, especially in fields where seasonal work is needed (agriculture, meat industry, construction, home care etc.) – was one of the main strategies to ensure a decent living standard (Cosma, Ban and Gabor 2020; Ottonelli and Torresi 2016; Sandu 2010; Vlase 2013). If most European states solved the problem of care by hiring migrants, in Romania – which also relies on a family model

of care – hiring migrants to substitute for family members working in the EU is not plausible for the largest part of the population given the low family incomes. Furthermore, in the context of migration, child care becomes the responsibility of grandparents, older sisters or even neighbours (Bauer and Österle 2013; Pantea 2012), which creates a feeling of cleavage between care workers and the family who stayed home. At the same time, as Marchetti and Salih (2017) argue in the critical analysis of migration policies in the EU from neighbouring countries in the context of the feminisation of migration, it often happens that the migration process reproduces/perpetuates gender-role norms in which women end up in subordinate positions, in both their origin and destination countries. Women from underdeveloped or developing countries – ‘servants of globalisation’ – end up migrating and leaving their own families to offer care to other families from the Global North in a more financially profitable context while, in their own homes from their country, other women in similar or worse situations take care of their children and family (Parreñas 2015). This is how ‘global care chains’ are formed (Hochschild 2000; Parreñas 2012; Sahraoui 2019; Yeates 2012). Therefore, the long-term loss of both the formal and informal care resources and of the family resources from the home countries created a ‘care drain’ (Bauer and Österle 2013), a phenomenon much less visible than that of ‘brain drain’ but with equally significant costs for the home country. The redistribution of care work today creates an ‘international division of reproductive labour’ (Parreñas 2015), with psychological and emotional effects for the women involved.

The present research complements previous studies that analysed migration from Central and Eastern Europe to Italy from a circularity perspective (for a systematic review, see Triandafyllidou and Marchetti 2013). In this regard, Vianello (2014, 2016) and Fedyuk (2015) discuss two categories of Ukrainian migrant care workers: ‘in transit’ and ‘permanent’. The former perceives the migration project as temporary, often involving downward mobility and intended to help their family in Ukraine and eventually return. At the same time, the migrant in transit is part of the circulatory migration process as a life strategy, alternating life between Italy and the country of origin. The second category has a migration project in which the aim is to stay and integrate into the host society. Anna Kordasiewicz (2014) also classifies Polish care workers in Naples as live-in care workers (known as ‘around the clock’ work or ‘working day and night’) and live-out care workers (known as work ‘by the hour’). The former are generally part of the phenomenon of circular migration, while the latter are seen as migrants who are more likely to settle in Italy.

Similarly, comparing the migration of Ukrainians to the US (California) and Italy, Solari (2010) argues that there are major differences between the two. Migration to the USA tends to be more permanent and with minor effects on the host country. The migration of middle-aged and older women to Italy impacts on Ukraine as part of the post-socialist reconstruction process. Other studies, such as that of Marchetti and Venturini (2014) on the migration of mothers and grandmothers from Ukraine and Moldova to Italy, discuss the differences between the two national groups in terms of the migration strategies chosen and the provision of resources needed to ensure the well-being of families in the countries of origin. The authors argue that it is more likely that women from Moldova, generally younger, tend to have permanent migration plans. In contrast, those from Ukraine, usually older and with families in Ukraine, tend to be ‘in transit’. More recently, Olga Cojocaru’s (2021) contribution, which is based on interviews with women from Moldova who have a migration project ‘in transit’ in Italy, discusses how keeping the temporary or transitory nature of migration helps migrants to survive in precarious jobs and is characterised by downward mobility.

One particular way in which circulatory migration projects have been facilitated is documented by Marchetti (2013), who discusses Ukrainians and Poles working in shifts of between two and four months, with the possibility for the employer to register a single contract with two people. However,

such situations are rare in Italy, with the employer preferring to sign separate employment contracts with each care worker. Such arrangements are generally preferred by people who want to spend more time with their families and because it is less psychologically demanding. This type of job-sharing has been imposed from the bottom up, being arrangements that care workers are more likely to make (see also Triandafyllidou and Marchetti 2013). This particular type of circular migration occurs after the worker has spent a more extended period in Italy and built a network, generally working on contract (Marchetti 2013). Last but not least, the author argues that ‘circular-carer’ is not like other forms of temporary work, being a transnational form of job-sharing in which workers rely on relationships of trust and reciprocity. In the data analysis section, we discuss a similar category of Romanian and Moldovan seasonal care workers but who differ from the type described by Marchetti (2013) in that they replace people who have a contract or informal arrangement in Italy for shorter periods (ranging from two weeks to three months), generally without an employment contract. Recently the topic has gained more traction with the publication of an important book, *Il lavoro che usura*, which discusses the health and safety aspects of live-in care work by Moldovan women in Padua (Redini, Vianello and Zaccagnini 2020).

When it comes to the nature of the work, a sensible aspect stems from its informal character, a result of unregulated labour relations, especially for care workers who also live in the space where they work. This can lead to abuse and exploitation generated by the asymmetrical power relations between the care beneficiaries / their families and the care workers (Rugolotto *et al.* 2017). This fact is also problematic from the perspective of the almost complete lack of free time and the impossibility to integrate in the community, which generates a feeling of isolation and a psychological impact which is hard to quantify (Bauer and Österle 2013; Rugolotto *et al.* 2017; Sîrghie 2012). Last but not least, especially as no specific qualifications are required for care work, being a care worker involves many skills on their part, from specific care knowledge, to the ability to interact with people who often suffer from various diseases or disabilities (including mental) or to solve unforeseen situations. As Helma Lutz (2008) shows, domestic work is a labour-market niche which has an entirely unique nature: the intimate character of the social space where the work takes place; the way in which this job is perceived, as well as its gender component; the special and highly emotional relationship between the employer and the employee, which is personalised and characterised by mutual dependence; and the logic of care work, which is different from other types of labour. On the other hand, care work, although it entails a centre-periphery linking, cannot be relocated like a call centre in a country with cheaper labour but needs ‘educated and flexible migrants’ who easily adapt to the conditions in their new families. These elements, which are completely unique to the labour of care workers, are the subject of this article.

## Methods

This analysis aims to create a better understanding of how the daily work of Romanian care workers in Italy is done, using their own experiences and interpreting them in relation to the wider historical, institutional and political context. Starting from previous analyses (Vianello 2016) which describe two categories of Ukrainian migrant care workers in Italy, we expand the categories and analyse three specific types of labour migration from Romania to Italy in this sector, emphasising how the challenges of care work differ according to the migration project chosen by people from Romania working in Italy.

The methodology of this study is specific to qualitative research (Creswell 2013) and mainly relies on 20 in-depth, online semi-structured interviews (Fielding, Lee and Blank 2017; Legard, Keegan, Ward 2003), with a duration which varies between 45 minutes and 2 and a half hours. The interviewees are 14 people from Romania and 6 from Moldova (who, however, have a Romanian passport, which allows

them to travel within the EU) who work in the elderly-care sector. They either live and work in the homes of the beneficiaries (24 hours / 7 days), or work on an 'hourly pay' regime as care workers in one or several households or in connected fields such as cleaning and housekeeping (all participants initially experienced at least one 24/7 work placement). The participants work for either extended periods of time or for shorter periods in order to spend more time with the family in Romania. The participants work or have worked in most Italian regions, without any significant differences between their labour experiences. The interviews took place in Romania between July and December 2020, using online audio-video platforms. The interviews were carried out at the workplaces of the live-in care workers, the interview being scheduled by mutual agreement when they had free hours; in their own home in Italy with hourly paid care workers; or in their home in Romania with retired care workers or those who were working temporarily as substitute care workers. Additionally, we explored the interactions taking place on one online discussion forum dedicated to Romanian care workers in Italy and organised two interviews with stakeholders (a labour-rights lawyer and a community leader who works in the non-profit sector, focusing on care work).

The participants were selected through both recommendations and the snowball technique, in order to address the lack of trust specific to online interviews. The biographic interview, a technique which is useful for exploring the ways in which the participants internalised in time the accumulated experience, were organised around three general themes: the individual migration project, the nature of work in the care field and how they regard the host and origin society in the context of migration. In this paper we focus only on providing a classification of care workers in Romania.

The interviews were transcribed and the data analysed through the thematic analysis method (Braun and Clarke 2006; Bryman 2016). The names used in the quotes are not real but are pseudonyms to maintain the participants' confidentiality. The data analysis went through a reflexivity filter, given the fact that the research has a deeply feminised component, which means that there could be bias or presumptions. There are limitations on the type of information obtained, stemming from how gender relations were perceived (both authors are male). Added to these limitations are the perceived power relations, which are more challenging to identify and manage in online interviews.

The main limits of the research are mainly linked to the way in which the data were collected, which took place exclusively online given the restrictions generated by the SARS-CoV-2 pandemic. Although access to people working in this field was easier than it would have been for face-to-face meetings, given the nature of the work and the few free hours that they have, at least in the beginning it was difficult to create trust, which is necessary when studying a sensitive theme such as this one. Biographical interviews require building trust and empathy, which are difficult to accomplish online. For this reason, we decided to rely exclusively on recommendations in selecting participants. At the same time, prior to the interview, we had written or telephone conversations with the participants to explain in detail the purpose of the research and how the discussion would proceed and to give them some instructions to ensure that they had a good internet connection.

We interviewed the participants using familiar video platforms which they had already used to communicate with their family or relatives in Romania – with two exceptions, who preferred a telephone interview. The video interaction facilitated the development of a closer relationship. There are obvious limitations with online interviews, as it was challenging to be mindful of posture and body language. Also, being an ethically sensitive topic, we tried to be careful about situations that might trigger traumatic memories and to not insist on asking for details at such moments.

## Results

### *The care worker 'social career'*

How does one become a care worker? Starting from Goffman's (1961: 127) definition of a moral career as 'any social strand of any person's course through life', we can argue that there is a whole evolution of the care worker 'career'.

The main component of Goffman's theory consists of the assertion that the self can be analysed as the sum of several phased changes, understood as 'changes over time [that] are basic and common to the members of social category, although occurring independently to each of them' (1961: 127) and which explain the three care workers' categories which we describe below.

In the case of Romanian and Moldovan workers who started their migration project between early 2000 and 2010, the first job was usually low-paid and without an employment contract. The host family took advantage of the care worker's lack of training and/or negotiation power, unawareness of their rights and, especially, the fact that they did not speak Italian, by imposing work conditions without negotiating them. Usually, abuse was widespread in such cases, the initial period and the first jobs being extremely physically and psychologically demanding, as evidenced by this care worker in Como:

*The girls who come and don't know the language, the laws, they work a lot and for nothing. In Italy there's no legal 24-hour work. But our girls say – 'I'm going to 24'. The daily labour in the contract is for eight hours (...) but our girls wake up at night.*

As they gained experience and basic financial stability and extended their social networks, the social career of the job transitioned to the next stage and they could choose and negotiate their workplace more easily. Sometimes they can be the resource person who recommends other care workers within their family or acquaintance networks. The negotiated salary increases and contractual rights tend to be respected to a greater extent. In some situations, experienced care workers try to avoid difficult workplaces, such as those where they have to care for bedridden elderly people or people who are suffering from senile dementia or Alzheimer's disease. When they agree to care for these people, the requested salary tends to be higher, as this care worker in Cagliari explains:

*That's what (the employers) told me: 'We can't give you less because you know the rules (...)'. I repeat, you know the language, you have some experience, you have a small CV, be confident, show them that you know what you want and be a little professional and you have a chance to be better paid. This is the first secret. That's when they dig deep in their pocket, you know [laughs].*

One relative emancipation can be a situation in which the care workers give up their '24h' job (as a live-in care worker) and become an 'hourly' paid live-out carer. They work either in housekeeping, babysitting or elderly assistance. Working an 8-hour-a-day job and renting an apartment usually means more physically demanding and less stable employment than that of a live-in care worker but the work is less psychologically demanding. A driver's licence and having a car can be key to obtaining daily employment contracts as care workers for the elderly, at a retirement home, as babysitters or as housekeepers, jobs which, at the end of the month, are better paying and less demanding than being a live-in care worker. We only observed this evolution of the 'care workers' career' through people who lived long-term in Italy (over 10 years), had vast experience of several jobs and had, especially, an extensive social network

which facilitated their access to better-paid and less-demanding jobs with increased independence, as this care worker illustrates:

*You can't do hourly work without a car; you waste more time waiting for the bus. I was lucky, they were looking for a live-in person but with a driver's licence. And the household car was my car, I drove it. The man was self-sufficient at 92 years old; I was doing the shopping, taking him to the doctor when he needed it.*

Often, overcoming the specific challenges of a live-in job by moving to a 'day' job is celebrated through a discourse of accomplishment. This discourse counter-balances the dominating discourse (media, politics, community and even family) through which they are blamed either for becoming estranged from their families or for becoming bourgeois in comparison to the home network/community members who did not migrate:

*I was staying at the seaside in the summer, eating for free at the restaurant. The old lady did not agree to calling me badanti; she introduced me as 'la mia compagna' [my companion]. Apart from €300 gifts from the family, one of the sons would put another €1,500 in my pocket, mentioning: 'For buying a gift for your niece and your son'. (...) And when I went home in September, they gifted me €10,000 and the car I was driving (care worker, Lucca).*

Such exaggerations are made because the discussions about care workers tend to focus on sensational negative events which contribute to the already negative image which they have in Italy. Almost unanimously, all participants considered themselves to be an exception to the norm and, although they shared their experiences of highly demanding jobs, breaches of their rights and sometimes abuse, they believed that they 'were lucky', as a care worker in Lucca said: 'My friends tell me that I was spoon-fed since I was little. They consider me an exceptional case'.

This can be a case of managing appearances and self-valorisation not only to counter the downward mobility (see also Vianello 2014) which they went through, producing labour which is unappreciated in both Italy and Romania but also to set themselves apart from the image of Romanians in Italy:

*To be honest, I personally managed to set myself apart from this stereotype of illiterate badanti; I never was and I knew to prove to both employers and Italian institutions that I'm not an illiterate care worker. But unfortunately, there are very few people like me in Italy (care worker, Turin).*

The phrase 'I was lucky', repeated several times during the discussions by almost all interviewees, denotes not only the arbitrariness of how the employment contract is perceived but also the perceived 'exceptionalism' of their own careers. There are many variables which are regarded by some care workers as unpredictable, uncontrollable and poorly regulated because they do not depend on legislation but on 'faith' or 'luck'. These are the family for whom one ends up working, the condition of the care beneficiary, whether or not any contractual or informally negotiated rights are respected, including free time and salary, and the lack of an adequate contract for the type of labour offered or the absence of an employment contract.

Experienced care workers who had lived for a long time in Italy sometimes have a self-motivating discourse of individual responsibility if they are informed about their rights and the national labour contract which clearly defines what the remit of domestic work is, what kind of work goes beyond that

and can be proportionally compensated for and what a care worker should never do. Their opinion is that the person who should fix the injustices in the sector is the worker, who must become responsible and who would not end up being exploited if she were better informed and negotiated with her employer, as these care workers in Bologna and Lucca specified:

*I don't think that I'm a servant: I know that I have problems at home and I fix them. How? That's my business. I didn't come to Italy to be a store manager; this is the work that the Italian state offers me and I am very happy that they guarantee me a salary, holidays.*

*The power [to change] is with us, cause if I like to suffer, I'll suffer!*

In spite of these statements, most care workers, especially those working on a temporary basis or who plan to work for a short period of time only (even though they end up working for longer periods), rarely have the chance to 'choose' in the rationally defined way above, as there are many barriers and constraints which determine that they accept what they are offered by employers.

For a better understanding of the Romanian and Moldovan 'care worker migration in Italy', we used three categories which analyse three specific types of migration and care work. We started this system from the two categories (vignettes) that Vianello (2016) proposed to classify Ukrainian care workers in Italy – the migrant in transit and the permanent migrant – which we adapted for the situation of workers from Romania and Moldova.

#### *The care workers in transit*

As in Vianello's description (2016), the 'care worker in transit' is the category of migrant the most often encountered, their main characteristic being that they do not plan to settle in Italy. Usually, the migrant in transit has a very precise reason for travelling and there is always a financial motivation to continue her work (e.g. to support their child/children in finishing their studies, to solve the family's financial woes – including debt – and to receive a pension from the Italian state). The care worker decides to take a job in another country either because she or her husband lose their job or when their incomes are so low that they are unable to cover their minimum living costs. Most often, the 'care worker in transit' is the victim of neoliberal policies from post-socialist countries, where massive layoffs and small salaries threw countless people, especially from the working classes, into poverty and unemployment. The 'care worker in transit' is usually middle aged and has children who are teenagers or in their 20s. Almost all interviewees in this category wanted to go to Italy for a short period of time to accomplish an economic objective for their family but ended up staying for a much longer period (even over a decade). Often, physical and psychological exhaustion are the decisive factors in their definitive return: 'I focused on my daughters' education and future..., so they are able to be competitive in any country or job. They were my "engine", and I was the stoker' said this care worker in Turin.

*This is how Romanians are: 'Let's build a house'. 'Let's help the boy finish school'. Sacrifices, sacrifices, sacrifices, because we can't do anything without sacrifices. I said I'd stay a year, but then 'Let's redo the bathroom'. 'Let's do that'. 'The boy must finish school, buy him a car and...'. That's how I ended up staying for 20 years (care worker, Turin area).*

As Olena Fedyuk (2012: 297–298) shows, the life of these women is put ‘on hold until she returns to her family and will start a life again’. These care workers are in a sort of liminality zone: neither home nor in Italy. They do not want to socialise too much beyond what is needed for their job, within the universe of other ‘care workers in transit’ and the local church and they often do not consider themselves migrants in another state. They are always thinking about their family in Romania or Moldova, often counting the weeks left until the next time they go home, returning being their main objective. The ‘care workers in transit’ therefore do not assume their migrant status completely and this leads to their invisibility, to them more easily accepting breaches of their rights and to their lacking a long-term professional plan. The situation is similar to that described by Vianello (2016: 170), who speaks about the Ukrainian care workers in Italy:

*Her behaviours, decisions, jobs, consumption and lifestyle are aimed at maximizing her earnings in order to return home soon, demonstrating loyalty to her family and fulfilling gender norms. She does not invest her energy in the improvement of her life and working conditions in Italy, since her life abroad is instrumental to the pursuit of her family interests, a realization that shapes her migratory experience.*

For most migrants in transit, consumption is limited as much as possible in Italy, with them often preferring to work on their day off for an extra amount of money than to go out and spend money, as this care worker in Genoa explains:

*Sundays are the only free days, and they are usually a total pain. Because you must go out, because they won't keep you and you don't have anywhere to rest, and you walk along the streets and in the parks. Summer is the worst – you're out all day in 35-degree heat, there's no toilet, no water, no food. You can't enjoy the rest, because you don't want to spend €2 euro on a coffee to go in a bar and use the toilet.*

According to Vianello (2016: 172), the migrant in transit regards herself as a mother despite the fact that her children are mature and she can often be a grandmother; however, she uses this role to legitimise her absence and migration – ‘Her narrations are permeated with the rhetoric of sacrifice: she is working abroad only to fulfil her *mission*, that is guaranteeing the economic well-being of her family and in particular of her children, postponing her own wellbeing’. The Romanian and Moldovan care workers are in the same situation, their stay extending and their final return becoming more of a fantasy as their family's financial problems are not over after a few years of receiving money from Italy. At the same time, the migrant loses the social network she left at home, which makes reintegration difficult, especially if they are still active on the labour market.

The downward social mobility of these migrants is almost a rule if we take into account their previous educational and occupational status. In practice, these are qualified people – with secondary or university education and with decades of experience in different occupational fields – who are doing unqualified and low-paid labour for the Italian standards in the domestic field. They accept to be a live-in care worker, known as a 24-hour job in extremely difficult working and, sometimes, living conditions, only so that they do not need to pay for food and rent. Although unhappy in their job, especially in comparison with the jobs of other colleagues, they the most often agree to continue because any time spent unemployed in Italy is wasted time and money. The separation between intimate and private life, on the one hand, and professional life on the other, is very thin and, for some, it does not even exist as sleepless nights and a lack of free time and privacy become the norm:



*I sleep with her (the old lady) in the room because if I don't sleep with her she walks around the house all night. I had my room but I had to give it up because she came seven times per night to check if I'm in the room and I wouldn't fall back asleep anyway. Now I stay in the same room with her, she wakes up around midnight to look at the time, I wake up a little, at 3 again, at 5 again, at 6 I start my day 'cause I must give her the pills and I got used to it (care worker, Rome).*

In some cases, the sacrifices made by leaving end up with the families falling apart and sometimes with the status of 'migrant in transit' changing to one of 'settled migrant', especially for people whose children are financially independent:

*[the departure] affected me very much because I broke up with my husband a few years ago. I left with the family's agreement, we broke up because my husband found somebody else, he preferred his mistress. We broke up, we are in good relations, the children grew up fine (care worker, Cagliari).*

In other cases, an elderly person in the family (grandmother, aunt) leaves especially to maintain the integrity of the children and her nephews' family intact:

*I decided to go instead of my son so that the family remains together, the kids have their mum and dad next to them, husband next to his wife. This gives me power, I am saving my family after all (care worker, Bologna).*

Besides, gendered family obligations of care work are not over for migrants in transit even after the period when they are raising their children ends, a period which overlaps with their stay in Italy. Often, the period spent in Italy ends in order to make room for unpaid care work within the family, either for elderly parents or, especially, as a babysitter for their grandchildren:

*I remain a permanent retiree. I split my time between Sweden and Romania because I have two grandchildren and I want to take care of them. I want to make up for what I lost (former care worker, Lucca).*

*I said that when she dies, I don't need another old lady, because my back and my legs were killing me. My rotulas in both knees are gone, I have chronic illnesses because of the stress and the life I led. So I stayed with my younger daughter, I cook until they come home from work, I clean... I couldn't work anymore (former care worker, Calabria).*

The anxiety of a migrant in transit is caused by the lack of a stable income once they return home, their financial independence relying on a never-ending extension of their stay abroad. At the same time, they risk downward mobility once they get home and their constant income becomes a thing of the past, with the migrant at risk of becoming poor in the long run.

### *The care workers settled in Italy*

The first subcategory of migrants working in the care sector who settle in Italy are women who stop being live-in care workers and rent an apartment, usually working in the care and cleaning sector and being hourly paid. Without being a rule, the decision to give up the live-in job is taken more often by young women with no family in Romania or Moldova, or women who are divorced and have grown-up children.

Reinforcing the decision to stay in Italy takes place when entering a relationship or getting married there. In general, the decision to emigrate is made at a time when employment opportunities and wage levels in Romania and Moldova are low. For example, this person from Chişinău migrated in the mid-2000s, when she was 23 years old:

*I have an accountant-programmer bachelor's degree and I started a second degree in Law. I was working as a computer operator at the Ministry for Internal Affairs but I received a €90 salary and I was paying €50 for rent. I decided to come for 5–6 years to Italy to save enough for an apartment so I can... I had a good job, I had studies but I didn't have a hole to live in. I decided to come here to build a house, something. In the end I stayed in Italy.*

Like many others, this person came on a 10-day travel visa for France or Spain, taking the opportunity to move immediately to Italy. Her first job was as a live-in care worker for an old person who died soon after; she then got another job in the care sector without an employment contract. The son of the new elderly lady for whom she was employed made her numerous sexual advances, many of which ended in abuse and harassment. Being locked in the house, she tried to run from this family after two and a half years, despite the fact that the elderly person's son was threatening her with his service weapon. She was helped by a non-profit organisation who offered her a place to sleep and protection for a time – the man's abuse could not be punished by a court because she was an irregular migrant in Italy. She then worked as a babysitter in another town, where she was also doing all the domestic labour, cleaning and cooking for the entire family: 'I was taking care of the house and the little girl [laughs] and everything. I wasn't a babysitter, I was like a mother in the family'. Then she got a job in a spa resort which offered her accommodation and where she was first a waitress and, after being trained as a barista, a bartender. This is where she met her future husband, a young Italian who was working for the same company; now she works as a housekeeper in the same place.

In other words, a migrant care worker in Italy can go from a semi-irregular status where she endures abuse in the work place to finally settling for good in the country if she has a safety net which can be consolidated by a relationship:

*The first two years, until I met my husband, who started defending me everywhere, were... I was a 23-year-old child and an immigrant... they looked at me like a prostitute. Italians don't like immigrants. If you're an immigrant, a little blonde, you're not Italian, they can tell immediately and already have a bad opinion. Later, when you start talking, they know who they're dealing with and change... but apart from that, 90 per cent it's like this. It was like an incubus because I was young, without documents, I was defenceless. I remember when I was at this old man's (the aggressor), during my two hours of free time I went to church and everybody was speaking ill of me, everybody in the village, apart from the priest, who saw that I was coming to pray and I cried, because I didn't have anyone to whom to go.*

Fedyuk (2012) discusses this category in her study on Ukrainian care workers in Italy. She argues that relationships with Italian partners are part of a process to create networks and safety nets and ways to manage intimacy in an extremely emotionally draining job. The situation is similar for Romanian migrants such as this care worker in Rome:

*My husband died after I had been in Italy for five years. I lost my parents too, but with the help of God I found somebody here, I managed to cling to something. But there are girls who don't have anything, they wait for the month's end to get paid.*

Another category of settled migrants is that of women who bring their family to Italy after several years of care work and settle in the towns where they work. They usually rent a place with their family and transition from the live-in care worker to undertaking hourly jobs. Usually, they bring their children while they are in school or university, who then study in Italy and, after a while, are able to get better paid jobs than their parents. However, not all families are successful; in many cases the husband or the children do not adapt and decide to return to Romania – particularly as, for men, it is more difficult to find a job in fields other than construction or agriculture:

*In January 2002 we left together. We had good relations with our Italian neighbours and family and we accepted hourly work based on a recommendation from the previous family. This made my work easier. These recommendations are very important. I wanted to bring my whole family, but my boy never wanted this, not even for holidays. My husband didn't find a job, so I went (on my own) to support my son.*

Settled care workers who are widowed or divorced and have children who no longer need financial support can enjoy socialising on their days off and usually make an Italian friend. Here is the testimony of a care worker for a rich family in Lucca, who has a higher status on the care-work market and who disagrees with 'care workers in transit' who do not take time off:

*Rather than sit on a bench in the park and eat my packed lunch, I preferred to go to a dance studio at 2. If I felt like dancing, I danced to club music or stayed there in an armchair, had the drink which is included in the entrance fee and left at 7, going for a pizza. That's what spending means. But there are Romanians who won't even buy an ice-cream.*

Settled care workers do not necessarily live in as much poverty as those in transit, enjoying a fuller social life, with a work schedule which is rarely longer than eight hours per day and with better paid jobs than the live-in care worker: 'I work 6h 40m per day, double pay on Sundays, paid extra hours, health insurance, maternity leave' (housekeeper, Grosseto).

Often, when they were young and just arrived in Italy, 'settled care workers' were, at the beginning of their project migration, 'in transit', having decided to settle for good once their migration became legal and they found better paid jobs. Moving into an apartment (either with their family from Romania or with other migrants) can mean working more hours to cover the rent but, as Vianello shows (2016: 173) when writing about Ukrainian care workers, they extend their social network by having more jobs. They practically choose their friends, make Italian friends and in time lose touch with their national community. However, the most important change takes place when they find a job outside domestic work, enriching their social capital and their network of local acquaintances.

Reuniting the family after many years of separation is not always without difficulty and can fail to meet the expectations of both parties (Fedyuk 2015). Adolescent children who move with their mother to Italy are often in a downward mobility situation: from the middle classes, to which they belonged because of the money and goods they received in Romania or Moldova, to the working class – manual labour or even the migrant lumpen – in Italy. They tend to have demanding and low-paid jobs, live in

small apartments – sometimes shared with other migrants – and their social mobility opportunities are limited, especially if they are not going to university in Italy. On the other hand, the elderly, sometimes dependent, remain in Romania, in the care of others, increasing the guilt felt by the care workers.

### *Seasonal care workers*

There is also a third category of live-in care workers who are not included in Vianello's research (2016), as Ukraine is not an EU member state and therefore the phenomenon is rarer there – except maybe the situation documented by Marchetti (2013) about circular carers working in alternating shifts of two to four months. Mutual help networks were set up between people working in Italy and those in Romania and Moldova (where most care workers also have a Romanian passport which allows them to travel and work without requiring a visa). As such, a large number of women continue to work for shorter periods of time – for a few months – and work seasonally or occasionally to replace other women. In many cases, this mutual help started through family networks. In order to go on holiday for part of the year or to solve problems at home without losing their labour contract (which sometimes means losing their job), they bring a replacement from Romania for a jointly agreed period of time. This category emerged during the past decade and was facilitated not only by the freedom of circulation within the EU which was granted after Romania joined the block in 2007 but also as a result of newly introduced cheap flights to Italy. This category usually replaces a 'care worker in transit' when she goes on holiday or can work in turns of one or more months with another seasonal care worker:

*I have worked in Italy since 2007. I was only the replacement. I left when I got my Romanian citizenship. I replaced several women. During that time, there were few women with citizenship and if they needed to go home, I went to replace them because I could travel. One, two, three months, I'd go to Italy and replace the women (care worker, Monza).*

The 'seasonal care worker' category is perhaps the segment the most likely to remain in poverty and exposed to abuse in various ways. Staying in Italy for relatively short periods (up to four months) and frequently changing jobs, these women are often working without an employment contract. In many cases, they do not have enough time to learn the language and become fluent and they are therefore unable to negotiate their salary, free time or job description. Furthermore, the person who is replaced or who recommends the replacement is usually making a unique offer, which does not allow for salary negotiation or registering an employment contract. A seasonal care worker who worked for a few years in Naples and Sardinia, changed jobs several times and never had an employment contract, had to buy food for herself and for the elderly person she was caring for because the family was not giving her enough. She also changed one job because the grandchild of the elderly person she was working for was sexually harassing her and when she had a medical emergency she had to quit the job to have surgery in Romania. In another job, she was locked in the house for a month with the elderly person she was working for, without receiving any free time, so that she was drained physically and emotionally to ensure the wellbeing of her employer:

*[The old lady] was very attached, we slept together, we moved our beds one next to the other, she was very warm. (...) I sang to her, I had to sing, to talk to her, because I learned the language, she said that she's my teacher and she taught me. And she was crying for me, to have her Mariana with her! But*

*I couldn't take it for more than two months because she was waking me up every five minutes. Plus, I had problems with my teeth so I came back.*

Another type of seasonal care worker is similar to that described by Marchetti (2013) – women (including from the same family) who share the job, staying for relatively equal periods followed by breaks in which they take turns to return home. Most often the seasonal care workers stay for shorter periods of time because they prioritise a closer relation with their family in Romania and Moldova. They do not usually have an employment contract because, on the one hand, they are staying for relatively short periods of time and/or replacing people who already have a contract and, on the other, because they need more flexibility and this can be better ensured without a legal document:

***The fact that you had family in Romania determined you to not stay permanently in Italy?***

*That's right, well said. It would have tied me down for too much time. The contract was made for one year minimum, and I would have had to stay. Many women preferred to stay for longer to have more job security there. I only supported my child but at the same time I'm happy that I kept my family together. We didn't break up. And my husband took care of the kid. Being apart wasn't easy, but for 3–4, maximum 5 months... (the conversation about) these things is tearing me apart. Very hard (care worker, Turin).*

In this type of arrangement, free time is often non-existent, the care worker preferring to give up her free hours and days to make the most of her stay in Italy. This category of care worker can partially overlap with those in transit but the significant difference is that those in transit spend long periods in Italy. The care workers in transit, on the one hand, accumulate experience and better manage the jobs they choose but, on the other, the psychological discomfort is higher. Seasonal workers have the psychological comfort that they will return home relatively quickly but are subject to a greater degree of violation and exploitation of their legal rights.

## **Conclusions**

The social transformations in Romania that followed the fall of the socialist system generated one of the largest waves of migration for work in the world (as a percentage of the total population). Italy is the main destination country for this workforce from Romania and being the country with the oldest population in Europe, the elderly-care sector created jobs for women coming from Romania. Furthermore, this sector relies almost exclusively on the work of migrant women, with Romanians being the main group. As it is almost 20 years since the first migration waves, this article has offered a classification of care workers, taking into account the nature of the work and the chosen migration project. Using a qualitative methodology, based on in-depth biographical interviews with care workers from Romania and Moldova, it describes the main challenges associated with physically and psychologically demanding work.

Our assertion is that Romanian care workers, especially those who started their migration project between early 2000 and 2010, make a sort of social career of the job. They usually started with low-paid jobs where they had no employment contract and where they experienced different types of exploitation. The care workers reached somewhat better positions once they mastered the language and their

labour rights and expanded their social networks. Sometimes, the relative independence which is obtained with the experience of several years of migration is celebrated through a discourse of accomplishment contrasting with the image of the live-in care worker in society, the professional downward mobility or the sacrifices implied by migration and a suffocating and unskilled job.

Using Vianello's classification of Ukrainian migrant care-worker categories (2016), we have described three vignette-categories which are specific to the Romanian and Moldovan care workers in Italy. The 'care worker in transit', the largest category, is represented by women who do not plan to settle in the country where they work, despite staying for long periods of time in Italy (over 10–15 years), as they are welfare providers for the family back home. Most of them live permanently in the same house with the elderly person they are caring for. The peculiarity of this category is that, although initially, the women think of staying for a short period, they extend their stay in Italy in the absence of better opportunities. In these conditions, they often do not fully assume their migrant status, thus contributing to their isolation. The 'settled migrants' are usually women who renounce their *live-in care worker* status and who, after a period of 'transit', decide to stay for good in Italy, a process which is usually facilitated by the rest of their family joining them there or by finding a partner. In general, they continue to work in the care or housekeeping sector but do not live in the same household where they work, which allows for their better integration into the host society. The 'seasonal care workers' are women who practice temporary care work in Italy, usually replacing or taking turns to work with another person. Seasonal carers supplement their income from care work, benefiting from cheap flights to Italy. Most of them choose to work for shorter periods in order to stay with the family in Romania for most of the year. Further studies should research in greater depth the emergence of the seasonal worker from Central and Eastern Europe who commutes every few months to work in agriculture, construction or care and who is, most of the time, a victim of abuse and exploitation. In the long term, a seasonal lumpen-proletariat class is formed, with members migrating every few months to Western and Southern Europe to survive (see also Rogozanu and Gabor 2020; Voivozeanu 2019).

## Notes

<sup>1</sup> Data source: <http://dati.istat.it/>, Resident foreigners on 1st January – Citizenship.

<sup>2</sup> [Commission's debate on the ageing population \(europa.eu\)](https://ec.europa.eu/commission/debate/ageing-population).

<sup>3</sup> [Osservatorio sui lavoratori domestici: pubblicati i dati 2019 \(inps.it\)](https://www.inps.it/osservatorio-sui-lavoratori-domestici-pubblicati-i-dati-2019).

<sup>4</sup> [Worker legalization in Italy to bring 'at least €160 million' in tax revenue - InfoMigrants](https://www.infomigrants.net/en/post/12345/worker-legalization-in-italy-to-bring-at-least-160-million-in-tax-revenue).

<sup>5</sup> Details here: [https://www.corriere.it/english/19\\_aprile\\_08/italy-syndrome-the-clinic-of-our-carers-3255a5cc-5a11-11e9-9773-c990cfb7393b.shtml](https://www.corriere.it/english/19_aprile_08/italy-syndrome-the-clinic-of-our-carers-3255a5cc-5a11-11e9-9773-c990cfb7393b.shtml), here: <https://www.aljazeera.com/indepth/features/romanian-migrant-women-suffer-italy-syndrome-190212095729357.html>. For a journalistic investigation produced in Romania, please see (in Romanian) <https://www.scena9.ro/article/sindromul-italia-imigranti> and <https://www.scena9.ro/article/sindromul-italia-imigranti-depresie>.

<sup>6</sup> In the media on the Romanian diaspora, articles on Romanian care workers were published more often. For an analysis of the narratives on Romanian care workers in Italy published in the newspapers *Emigrantul* (The Emigrant) and *Gazeta Românească* (The Romanian Gazette) please see Mădroane (2017).

<sup>7</sup> Italy has one of the highest shares of elderly people in the total population: in 2019, 15.7 per cent of the population was between 65 and 79 years old and 7.2 per cent were over 80 (Eurostat, tps00010).

<sup>8</sup> Italy has one of the highest life expectancies at birth in Europe: 83.4 years in 2018 (Eurostat, sdg\_03\_10).

<sup>9</sup> The term is considered pejorative due to the historically low prestige of the job but it continues to be used in the common language, signifying a non-qualified care worker who does everything in the house: the elderly care, housekeeping, cleaning, cooking and shopping.

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# Welfare Considerations in Migration Decision-Making through a Life-Course Approach: A Qualitative Study of Spanish EU-Movers

Katarzyna Andrejuk\*, Marie Godin\*\*, Dominique Jolivet\*\*\*, Sónia Pereira\*\*\*\*, Christof Van Mol\*\*\*\*\*a

*The welfare aspects of intra-European migration remain an important and controversial topic of academic and political debates. These discussions touch upon the classical ‘welfare magnet’ or ‘welfare tourism’ hypothesis. Transcending the politicised concept of ‘benefit tourism’, our paper examines how welfare-state considerations in relation to migration decisions vary across the life course. Relying on micro-level qualitative research focusing on Spanish intra-EU movers, the paper probes deeper into how individuals perceive welfare systems, analysing the subtle and nuanced meanings of different aspects of the welfare for their migration decisions. We focus more specifically on welfare provisions in terms of health care, compulsory education, child support and other care responsibilities, unemployment and pensions and retirement. Our research indicates that, in studies on the migration–welfare nexus, it is necessary to move beyond the current narrow focus on the welfare magnet hypothesis and to examine how diverse welfare arrangements continuously and dynamically set the context for migration decisions at various stages of an individual’s life. The results of our research show how features of the Spanish welfare system, in comparison to those of potential destination countries, might act as both a trigger and/or a barrier to migration. As such, we get a ‘thicker description’ of the role which welfare might play in shaping individuals’ eventual migratory aspirations and decisions.*

**Keywords:** migration aspirations, migration decisions, welfare state, welfare magnet, crisis, Spain

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## Introduction

In recent years, the relationship between intra-European migration and welfare systems figured prominently in European political and societal debates. These heated discussions are not new and touch upon the classical ‘welfare magnet’ or ‘welfare tourism’ hypothesis. From a rational choice perspective, it is expected that migrants will tend to move to countries with more-generous benefits compared to their home countries. In a context of rising right-wing populism as well as a longstanding narrative on the ‘crisis of the welfare state’, even some groups of EU migrants are now perceived as a potential burden in several European welfare states. EU citizens enjoy cross-border welfare rights when they move to another EU country – either through access to benefits in the country of destination or through the export of benefits from the country of origin (Jorens and van Overmeiren 2009; Martinsen 2005; Verschueren 2009, 2014; see also Regulation (EC) 883/2004 and 987/2009). As a response and to reduce this expected benefit tourism, several EU countries have been introducing a range of social policies to control third-country nationals’ as well as intra-EU migrants’ access to domestic welfare benefits. For example, in the UK, access to most social security benefits and tax credits – including child benefits or child tax credits – is limited to those EEA migrants with the ‘right to reside’; in Belgium, control on welfare use has effectively turned into an instrument with which the Belgian authorities intend to keep undesirable EU migrants out (Lafleur and Stanek 2017a). In addition, in 2014, the German government announced the adoption of ‘New rules to fight “EU benefit tourism”’, implying that EU migrants would no longer be entitled to social welfare benefits after six months of unemployment.<sup>1</sup>

In the EU context, Central and Eastern European migrants are the classical focus of the literature on the links between welfare systems and migration (see, *inter alia*, De Giorgi and Pellizzari 2009; Kahanec and Zimmermann 2010; Kureková 2013); in the public opinion and among policy-makers much less attention has been paid to other European migrants (Barbulescu 2017). Nevertheless, the Southern European countries of Greece, Spain, Portugal and Italy were deeply affected by the 2008 global economic crisis and/or subsequent austerity measures; for some time they have had the highest unemployment rates, which is generally considered a major trigger for migration. Indeed, new migration patterns seem to emerge from these Southern European countries towards countries with more-stable economic positions such as Scandinavia, Germany or the United Kingdom (Bygnes 2015; Van Mol and de Valk 2016). Furthermore, the ‘ongoing contraction of freedom of movement rights’, including restrictions in access to domestic welfare benefits mainly portrayed as targeting Eastern European migrants and Roma in particular, have a similar impact on the movement of Southern European migrants (Barbulescu 2017: 27). Our paper contributes to the emerging body of literature on these flows (see, e.g., Izquierdo, Jimeno and Lacuesta 2016; Lafleur and Stanek 2017b) by investigating the role which welfare systems play in these migration patterns. To this end, we examine the micro-level migration decision-making processes of 50 Spanish migrants whom we interviewed in the Netherlands, Norway, Poland, Portugal and the United Kingdom in 2016.

We start, in particular, from the premise put forward by de Jong and de Valk (2020: 1776) that ‘the role of welfare arrangements in migration decisions may vary depending on the moment of migration within a person’s life, as individuals’ welfare rights and needs change over the life course’. As these authors indicate, the life course has been largely overlooked in studies on the link between welfare systems and migration decisions. By investigating these links over the life course at the micro-level using qualitative data, we aim to advance the existing literature in three ways.

First, most studies on the link between welfare states and migration decisions in Europe are quantitative. The qualitative studies are still rare (see de Jong and de Valk 2020; Godin 2020; Jolivet, Pereira

2021). The studies generally rely on macro-level indicators – such as government spending on welfare and migration flows – and present mixed findings (see e.g. De Giorgi and Pellizzari 2009; Giuliatti 2014), ‘which suggests that the role of welfare systems in intra-European migration decisions might be more complex than has been theorised so far’ (de Jong and de Valk 2020: 1776). By relying on micro-level qualitative research, this paper aims to advance these debates by probing deeper into how individuals perceive welfare systems and by grasping which aspects of the welfare state they potentially take into account when making migration decisions. Even though welfare arrangements might not be important at the time of making such a decision, migrants may compare elements of welfare states that might become important later in life (de Jong and de Valk 2020). As in their study, we look specifically at welfare provisions in terms of health care, compulsory education, child support and other care responsibilities, unemployment and pensions and retirement. In contrast to other qualitative studies on the subject (e.g. de Jong and de Valk 2020; Ehata and Seeleib-Kaiser 2017) which focused on a single destination country, we focus on a single country of origin and a broader variety of destinations, which allows us to consider which welfare considerations are generally made by intra-European migrants, irrespective of the country of destination.

Second, most existing scholarship looking at welfare and migration focused on non-European migrants (e.g. Brücker *et al.* 2002) or Central and Eastern European migrants (e.g. Kureková 2013). However, as indicated in the previous section, intra-European migration flows have become more diversified in recent years, including, in particular, a larger share of south-north migration within the EEA. In sum, with this paper we aim to advance our knowledge of the links between welfare and migration decision-making and explore the likelihood of the welfare magnet hypothesis in the context of recent Spanish intra-EU migration.

Third, by situating migration decisions within a wider life-course perspective, our paper contributes to current debates in the international migration literature which propose going beyond theoretical approaches that consider migration as a single action rather than a process.

## Background

### *The links between welfare and migration decisions*

The welfare magnet hypothesis (Borjas 1999) postulates that migrants originating in poorer countries will be more likely to move to more-generous welfare states. Most of the empirical evidence concerning this relationship originates from the US (Giuliatti 2014). The existing evidence in Europe, however, generally shows that the effect of welfare generosity is quite small when compared to labour-market conditions (Josifidis, Supic, Pucar and Srdic 2014). If welfare regimes play an important role in migration decisions and migrants make rational choices, as assumed by classic economic theories of international migration (see e.g. de Haas, Castles and Miller 2020; Samers and Collyer 2017), we can expect that Spanish potential migrants will consider different destinations throughout the decision-making process, to ultimately select the country where they can enjoy the highest level of benefits for their particular situation, namely in terms of stage in the life cycle.

However, the welfare magnet hypothesis ignores the fact that welfare systems encompass other aspects than protection against low incomes or the loss thereof, such as access to and the quality of healthcare services or the barriers for non-nationals in accessing formal social protection in other states. Additionally, other factors might also play a role in shaping migrant’s perceptions of the welfare regime

in the destination country. Migrants are not necessarily in possession of complete and perfect information on welfare provisions in destination countries before moving; neither might they be aware of the social rights they might have or lose in their origin country by moving. In addition, migrants' lack of awareness on entitlement and access to rights and benefits (Bruzelius, Chase and Seeleib-Kaiser 2016) places them in a potentially more socially disadvantaged position *vis-à-vis* majority members or those who remain in the origin country. In a recent qualitative study on European migrants in the Netherlands, de Jong and de Valk (2020) concluded that welfare systems affected migration decisions in three regards. First, the welfare system of the country of origin can provide a safety net against the risks of migration. Second, experiences with the welfare system of the receiving country can influence European migrants' decision to stay in the country of destination and, third, welfare dependency can have a retaining effect, making it more unlikely that people will move.

### *Configurations of welfare arrangements across the life course*

International migration research increasingly acknowledges the importance of considering distinct phases of the life course when analysing international migration decisions (see e.g. de Jong and de Valk 2020). Factors such as income and age cleavages shape people's redistributive preferences (Busemeyer, Goerres and Weschle 2009: 207). The life course is also important when considering attitudes towards welfare use (see e.g. Busemeyer *et al.* 2009; Svallfors, Kulin and Schnabel 2012). Younger people, for example, may be more interested in a state's investment in education, while older people have different welfare needs and support a state's spending for pensions (Busemeyer *et al.* 2009). However, how such variation across the life course fits migration decision-making processes remains underexamined.

Spanish migrants are a particularly interesting group to look at in this respect. After all, it has recently been argued that the number of Spanish citizens in other European countries is possibly much higher than it appears in official data. As pointed out by González-Ferrer (2013), official migration statistics from Spain are based on the 'Padrón' municipality population register and Spanish citizens are only deleted from these registers when they officially register with a Spanish consulate abroad. Nevertheless, many Spanish migrants do not do this, since they lose the right to some Spanish benefits by doing so. Indeed, when the official statistics in Spain are compared to those of the UK or Germany, it appears that there are four and seven times more Spanish migrants in these countries than expected on the basis of the Spanish registers (González-Ferrer 2013).

### **Setting the context: old and new Spanish emigration**

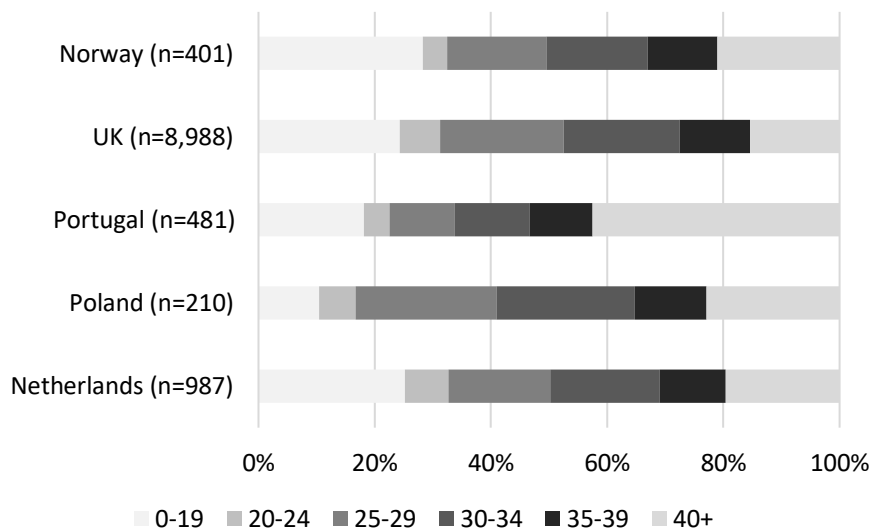
Spain has a significant history of emigration. In the period of the guest-worker programmes after the Second World War up until the oil crisis, Spanish workers were recruited in North-Western European countries such as Germany mainly to be short-term workers in low-skilled professions (Schmidt 1994). Most of these migrants originated from poor agricultural regions characterised by significant levels of unemployment (Bade 2003). During the 1960s, about 170,000 migrants left Spain annually of whom 80 per cent headed towards European countries (Izquierdo *et al.* 2016). It has been estimated that, between 1960 and 1974, more than 3 million Spanish migrants went to other European countries (Valero-Matas, Mediavilla, Valero-Oteo and Coca 2015: 60).

Whereas, since the beginning of the 1990s, the balance in Spain changed from a country of emigration to immigration, in recent years a new outflow of Spanish nationals can be observed and the migration balance has changed yet again from immigration to emigration as a result of the economic crisis (Castles

*et al.* 2014; González-Ferrer 2013; Izquierdo *et al.* 2016). Recent survey evidence suggests that many individuals think about migration in Spain: 48 per cent of Spanish people are said to be willing to move abroad, compared to 30 per cent in Sweden and 35 per cent in Germany (González-Ferrer 2013). In terms of the people who actually move, numbers from the OECD (2013: 23) show, for example, that the annual number of people moving from Spain more than doubled between 2007 and 2011. Although the outflow of migrants is dominated by non-Spanish citizens moving back or onwards (Domingo and Blanes 2015; González-Ferrer 2013; Izquierdo *et al.* 2016), there is also an increase in net migration outflows of the 'local' Spanish population (Izquierdo *et al.* 2016), particularly since 2012 (González-Ferrer 2013). Most Spaniards born in Spain migrate to other European countries or to the USA, the three main countries of destination being the United Kingdom, Germany and France in descending order of importance (González-Ferrer 2013; INE 2016; Izquierdo *et al.* 2016). The majority of the interviewees in our study can be situated within these migration flows, which developed over the last decade. Migration to the UK and Germany might have a significant economic dimension but this is not necessarily the case for migrants to other EU countries. In Poland, Spanish migrants as well as migrants from other Western-European states mainly migrate because of lifestyle factors or relationships with Polish partners (Andrejuk 2017). Many Spanish migrants who work in Poland were previously students at Polish universities.

Public debates on the recent outmigration of the Spanish-born has often focused on young, highly qualified migrants. However, a closer look at the available migration statistics suggests a larger diversity of flows in terms of age cohorts. According to official Spanish registers, in 2016, 24.4 per cent of the migration outflows of Spanish nationals born in Spain were aged over 39 years. There are also cross-country differences – for instance, migrants aged 40+ account for 15.4 per cent of the flows to the UK while, in Portugal, 42.4 per cent of registered Spanish migrants in 2016 were in this age range (Figure 1). This age diversity is likely to be relevant when studying the link between welfare systems and migration due to changing welfare needs throughout the life course – we take this variety into account in our analysis.

**Figure 1. Outmigration flows from Spain in 2016**



Source: INE (2017).



## Data and methods

Our analysis draws on semi-structured interviews collected between March and December 2016 for the Mobile Welfare project – a comparative study which aimed to improve the theorisation of the role of welfare provision in migration aspirations and decisions. The study targeted people with different migration experiences: some never migrated, others migrated and returned and others were living abroad. The interviews with the migrants were conducted in five EU member states (The Netherlands, Poland, Portugal, Spain and the UK), Norway and Turkey, with different welfare needs according to the migrants' position in the life course and taking into account the macro-, meso- and micro-level context, from both the origin and the destination perspective. The interviews set out to gather information on the role of different social-protection providers in people's mobility and immobility aspirations and decisions, mainly the formal welfare state, the private sector and personal/social networks. We explored both the perceptions and the use of welfare arrangements in the countries of origin and destination and their transnational dimension. The interviewees were asked explicitly about various areas of welfare: we focused on people's arrangements in a variety of domains such as healthcare, education and childcare, the loss of income due to retirement or unemployment and the care of the elderly. The qualitative approach allowed us to examine the subjective perspectives of individuals, explaining more comprehensively the significance of the various dimensions of welfare, personal accounts of welfare accessibility and nuanced approaches to formal/informal elements of welfare throughout the life course. The interview guide was structured in three main parts, inquiring about individuals' life before migration took place (if applicable), their post-migration personal experiences and those with the welfare systems in the country of origin and destination and, finally, their future perspectives. Our aim was to achieve a 'thick description' (Geertz 1973) of the migrants' emotions and the meanings behind their actions. Interviewees had the opportunity to speak freely about their understanding of welfare and interpretation of their actions, thus allowing the researchers to avoid rigid categorisations prior to collecting the empirical material.

In this article we focus on Spanish migrants in urban areas in the Netherlands (the Randstad area), Norway (Oslo), Portugal (the Lisbon Metropolitan Area), Poland (the Warsaw area) and the UK (London and the commuting area, in particular Oxford). The selection of countries was made in order to cover a plurality of types of welfare systems (Esping-Andersen 1990; Moreno 2013; Moreno and Sarasa 1992). This allows us to uncover how differences between welfare systems might influence migration processes as well as the role which welfare considerations play in migration processes, irrespective of the destination country. The latter is the focus of our paper. The Netherlands can be classified as a *conservative-corporatist welfare state*, providing support to families when they lack the necessary resources to guarantee their well-being. Norway is classified as a *social-democratic welfare state* that promotes economic solidarity independent of individual contributions. The UK is considered a *liberal welfare state* in this classification, characterised by reduced benefits to individuals and an increased reliance of people on the market and employment. Finally, Spain and Portugal are characterised as having a 'mid-way' or mixed system, with some elements of the corporative system, strong family solidarity and the role of property acquisition as social protection. Research indicates that welfare regimes in post-communist countries are different to those in Western Europe and require addition to Esping-Andersen's typology (Fenger 2007). Poland, like other post-communist EU member states, is defined as a country of 'post-communist European type'. While it resembles the welfare type of the post-USSR states, its welfare regime is more egalitarian than in post-Soviet republics and the level of social well-being is higher than in Eastern Europe (Fenger 2007: 24–25).

Within the research localities, the selection of Spanish interviewees was done through snowball sampling methods, with multiple entry points in order to ensure coverage of the different participant categories (via churches, migrant organisations, embassies, personal and professional networks and Facebook groups of Spaniards living abroad such as *Espanoles en Londres*, *Espanoles en Lisboa* or *Catalans a Londres*). The diversity of entry points ensured a comprehensive coverage of profiles in terms of socio-economic background. This is important, 'as the literature on migration and welfare often expects welfare to be more important to the lower-educated' (de Jong and de Valk 2020: 1780). Besides the migration experience, our sampling targeted men and women who were active in the labour market – employed or unemployed – or who were active in the past. Additionally, we took into account the different life-transition events diversifying the sample in terms of sex, age, family and occupational situation. The literature indicates that attitudes towards welfare (including welfare spending) are affected by an individual's position in the social structure, stage in the life cycle and age (Busemeyer *et al.* 2009; Kulin and Svallfors 2011; Svallfors *et al.* 2012). The diversity of our sample can be summed up in a heuristic classification, with three types of interviewee according to their life stage at the time of the interview (see Figure 2): first, younger people with relatively few years' activity in the labour market and without children; second, interviewees with children under 15; and, third, older interviewees for whom strategies against the loss of income due to retirement could be more relevant than for participants in the other two groups.

**Figure 2. Profile selection criteria for interviews**

	Age	Transition period	Family situation
<b>Profile 1 (P1)</b>	18–35	From studies to working life (first years of working experience)	No children
<b>Profile 2 (P2)</b>	25–54	Recent family formation or parenthood	Moving together with their partner, with plans of having children or with at least one child (up to 14 years)
<b>Profile 3 (P3)</b>	55 or more	From working life towards retirement or retired	Diverse situations

The stage in the life course at the time of migration might differ from that at the time of the interview. For instance, those who already had children when interviewed (Profile 2) might have migrated before they had any family plans. Likewise, young migrants without children (Profile 1) might have migrated with the idea of having children soon. Finally, those aged 55 or more (Profile 3) could have migrated at a younger age after their studies. Most of the interviews were conducted face-to-face although four were conducted via Skype. They were all transcribed into English and coded using NVivo. This article analyses 50 interviews: 12 in the Netherlands (NL) (P1, P2, P3), 8 in Norway (NO) (P1, P2), 14 in the UK (P1, P2, P3), 8 in Poland (PL) (P1, P2) and 8 in Portugal (PL) (P1, P2). Drawing on these empirical data, in the next section we analyse whether differences in the European welfare systems shaped our interviewees' aspirations and decisions to migrate. Simultaneously, we look at the impact of age and life stage on the link between welfare and migration decisions.

When conducting the empirical research, we observed the ethical standards required from projects involving vulnerable groups. The interviewees were notified about the aims of the project and the institutions involved. All interviewed individuals gave their informed consent and their participation was voluntary. The interviews were anonymised before the analysis and no personal data were disclosed in the article.

### **Welfare in migration decision-making: differences across the life cycle**

As a central aim of this paper is to analyse how welfare-state considerations may be played out differently in the decision to migrate or to remain in the country of emigration across the life course, we organised this section according to the life phase of our interviewees: whether young people, family life and older individuals (approaching retirement or retired). For each stage of the life cycle, we systematically examine the narratives of our interviewees to identify whether and how they took welfare considerations into account throughout their migration process (before departure and upon arrival) in the different domains (unemployment, healthcare, education, retirement), including the origin as well as the destination countries.

#### *Young people's migration aspirations and decisions*

When analysing the interviews with young Spanish adults in the various destination countries, differences between welfare systems did not appear to play a crucial role in their motivations for leaving Spain. Instead, some of them clearly suggest that finding a job, quality of life, experience and, more recently, the economic crisis were primary motives for relocating to a different country. Many interviewees stated that they were unhappy with the situation in Spain – some of them making explicit reference to the crisis – and therefore searched for a job abroad:

*Well, actually, I don't know if you know but the situation is completely a mess, like a big drama. Because all my friends (...) all of them are now outside of Spain. (...) Eh, we don't have the opportunity to work. (...) It's completely..., it's a big drama. Because all my friends – one in Australia, my cousin lives in Frankfurt, because we don't have opportunities. I think we have a good education – at university – but the problem is, we finish our studies and say 'OK, I want to find a job' but we don't manage to (Profile 1, NL-01).*

The intra-EU mobility policies also enforce, to some extent, a self-selection of potential migrants. The mobile youth are often students and graduates whose first mobility experiences include university exchange programmes in another EU country. These resourceful and ambitious individuals are more prone to take advantage of their cultural capital and seek work experience, rather than remaining unemployed and looking for social benefits. Even in the process of family-motivated migration, they take into account the prospects of improving their situation on the labour market:

*South Spain, I studied philology there. When I finished, I decided to ask for Erasmus abroad and went to Greece. In Greece I met a person who is my husband today, he is Polish. So after this Erasmus I went back to Spain; I looked for a job there for a couple of years and I didn't find anything interesting there. So, after three years of being together but not together I decided to move to Poland. And that was 2007, the beginning. So I have been here for eight years (Profile 2, PL-04).*

Although our interviewees did not explicitly indicate that welfare systems had a determinant role in their decision-making process to migrate or not, their narratives suggest that certain aspects of the welfare system of receiving states might have been taken into consideration. The following quote, for example, illustrates how a Spanish interviewee who moved to the United Kingdom had also considered moving to Northern Europe, making particular reference to certain elements of Nordic welfare systems:

*Because I think, in Nordic countries, you can have a decent quality of life. I mean, there's a good health service, social benefits, it's an easy way of living, there are reasonable distances between cities, where you can... wages are quite high as are living costs... Even though you can do things, you can have a social life. London's more complicated but at the same time it provides more job offers in my professional sector. There are more... All international pharmaceutical companies have either their European headquarters or a subsidiary in London. All of them. If you want to be someone within the pharma world you have to be in London (Profile 1, UK-64).*

Although our young Spanish interviewees might have had some vague ideas about the welfare system in their destination country before moving, most of them indicated that they did not explicitly search for information on welfare-state arrangements before migrating. Most of them moved first and then checked how things should be organised. The fact that they did not search for information about welfare arrangements prior to departure might be related to the fact that the younger generations are much more accustomed to travelling and spending short periods abroad, which they relate to lesser concerns about gathering information and preparing the move. As Barbulescu (2017: 27) indicated, 'Unlike Central and Eastern Europeans, young Spaniards (...) have been socialized in a Europe in which mobility is free'. Because of their experience of this freedom of movement in the EU, they probably also expect welfare arrangements in various EU countries to be similar and that they would have easy access to them. However, in the cases where information on welfare is gathered *before* migration, our data also suggest that it is not because people are informed about the welfare system before departure that they choose to rely on it. The next quote indicates that the person had a good knowledge of the welfare system in the UK before migrating. He did quite a lot of research and got the information through the people who were already living in London (friends and friends of friends). He also relied quite intensively on the Internet to find information about the British welfare system. However, while having the knowledge can provide a feeling of economic security when making the decision to migrate, it does not mean that migrants rely on it:

*Well, I knew that, as a European citizen, I had access to social security and a free health service, that there was a developed benefits system and that, even without having worked before in England, you could claim unemployment benefits... which I didn't do even though I know there's a lot of foreign people doing it. (...) So I knew I could rely on this, as well as on Spanish unemployment benefit, which I could transfer. Taking into account all these things, I decided that I could count on economic security even if I couldn't find a job (Profile 1, UK-64).*

Our data suggest that these young adults also generally chose their destination country because of previous travel and social networks, such as friends and family members who were living there, rather than for welfare-related factors. Furthermore, our data also illustrate the ways in which the origin country's welfare regime remains important throughout the migration process in domains such as unemployment benefit

or healthcare. Migrants strategically maintain access to the social protection offered in the origin country even after migration:

*I was getting the unemployment subsidy from Spain and you are not allowed to leave the country. I registered here at the City Town Hall but obviously, they are not going to get in touch with the Spanish government. Spain can only know once you register yourself at the Embassy. I didn't see any advantages [in doing so] (Profile 1, NL-11).*

In terms of healthcare, many of our interviewees stated that, once they were acknowledged by the receiving country's healthcare system, they considered the Spanish system to be better. Some of them appreciated the advantages of the host country's healthcare but preferred to keep in touch with the Spanish system for reasons of continuity of medical treatment. As a result, many of these young adults seemed to adopt a strategy of 'welfare bricolage' (Philimore *et al.* 2015, 2021): they combine private with public healthcare and regularly travel back and forth to Spain for medical care, instead of relying exclusively on the receiving country's healthcare system.

Altogether, this suggests that welfare in the destination country does not function as a magnet in the migration projects of young Spaniards. Quite the contrary and in line with the findings of de Jong and de Valk (2020), some migrants are actually reluctant to give up their welfare entitlements in the country of origin. As such, welfare arrangements do seem to play a role in their migration trajectory. Even though they tend to define their decisions in terms of personal agency and the freedom from constraints, our results particularly suggest that access to welfare, both in the host and the home countries, played an important role in the migration decisions and experiences of our young adult interviewees.

#### *Migration at the stage of family formation*

We also observe that, for our Spanish migrant interviewees who are at the stage of family formation or have children younger than 15 years old, welfare arrangements generally did not seem to play a major role in their migration decisions and considerations. Most of the people we interviewed with this profile moved for love and/or family reasons, which often also intersected with professional considerations.

Compared to the first profile, however, the comparisons which migrants in a phase of family formation make between welfare systems in the countries of origin and of destination were much more salient during the interviews. Several interviewees indicated, for example, that they compared the solutions available in both countries in terms of childcare and child benefits:

#### ***Do you use child benefits in Poland like 500+?***

Yes.

#### ***What is your opinion about it? Is it positive solution?***

*Yes. You have some money for the children. In Spain they are furious because there was 3,000 euros for each child and then there was the crisis and they could not give this support but here it is possible to have this economic help and it's super (Profile 2, PL-001).*

In the decision-making process, the impact of migration on opportunities for accessing informal child-care arrangements is also taken into account, as in the case of this male engineer with a 3-year-old daughter:

*Well, we know that there are pros and cons in each place (...) we knew that having a family here would be more complicated as we would have to do all the work without family help or resources for all of this (Profile 2, UK-81).*

Furthermore, for some of our interviewees, education also played a role. This was especially the case for those who migrated to Norway and Poland. For example, one of our interviewees (Profile 2, NO-57) migrated to Norway mainly to provide his son with the type of education that he considered in Spain to be only accessible in the private sector. Nevertheless, our Spanish interviewees in Norway did not consider the Norwegian education system to be better than the Spanish one. For instance, one of our interviewees migrated alone while his two daughters stayed in Spain with his ex-wife, as they preferred the Spanish education system. However, he now wants to bring his daughters to Norway because they will learn what it means to live in a different country (to be a migrant) and they will practice foreign languages: 'When they finish middle school, they'll be able to speak four languages fluently; for me it opens their doors to any job (M-P2-SP-NO-49). This again suggests that welfare arrangements played a subtle role in structuring the migration decisions and experiences of our interviewees.

Those who have children – or who migrated with the idea of having them soon – also seemed to have a greater inclination, compared to the younger movers, to check how the healthcare system works in the destination country. Welfare factors also seemed to be taken into account in the decision-making process about staying after emigration:

*After the interviews and such, he [the partner] stipulated what he wanted and this included an insurance policy. We had, in China with the American company, a health insurance policy; to go to the international hospital, it was needed. For us this was important, without knowing that it was going to be so useful to us (Profile 2, PT-03).*

After starting a family, migrants logically need to rely more on social assistance. This includes both assistance from the state (e.g. childcare benefits) as well as informal welfare arrangements (e.g. help with childcare duties). In comparison to younger adults, parents more actively engage with welfare systems, seeking various forms of help, such as child benefits or good education services. Their transnational lives allow them to make sophisticated and nuanced comparisons of the quality of welfare in the different countries. Their narratives enable us to observe not only the objective but also the subjective character of the role of welfare systems in migration at various stages of life: those interviewees with families were more likely to recognise their welfare needs and to actively seek and expect help from their social and institutional environment.

In sum, our results suggest that an interest in and knowledge of particular aspects of welfare systems might be associated with the specific life stage of an individual. Migrants who had families seemed to be the most interested in education and welfare arrangements for their children and in parenthood as well as healthcare. Again, it is important to note that, because of their specific life stage, they were interested in *particular* aspects of welfare systems: most of the participants at this stage were still unaware of how to organise their pension.

*Older individuals: approaching retirement and retired*

Before discussing the retirement strategies of Spanish migrants, we should first mention a limitation of our research. In contrast to the other two groups, we only interviewed older migrants in the Netherlands and the United Kingdom. On the other hand, as Poland is a new immigration country, it attracts mostly young individuals; the population of older migrants is practically non-existent. As with the other two younger groups, our older interviewees did not indicate that they gave a prominent role to welfare arrangements when making migration decisions. Love migration occurred in this group as well, particularly when the migrants' partner already had children as it was then logical to move where they were based. Furthermore, our data suggest that the economic crisis also informed the migration decision of some of our interviewees who were almost at the end of their careers; for some, migration was the only way perceived to cope with unemployment. However, migration is also seen as a way to make a drastic change in life or as an opportunity for a new adventure. It is then considered a positive experience, a chance to discover a new place:

*I finished my time on this newspaper – it's the hardest moment of the crisis in Spain, which affects advertising... 2011... approximately at the end, I left everything and I became unemployed... you earn 1,200 euros and you have to pay the rent for a flat plus your children's costs. In 2012... 2012 and part of 2013... in 2013, I even went to Mallorca in June to work in whatever I could and I didn't manage it... but I went around all the most touristic zones asking for a job in anything – as a waiter, which would be the easiest, or anything else, but I didn't find anything. My daughter has a boyfriend who knows someone here and who is working and then I said 'Well' and why not, it was Oxford and Oxford for me was not only migrating, it was Oxford! (Profile 3, UK-78).*

This suggests once again that most of the interviewed Spanish migrants were driven abroad by motives other than welfare considerations. Just as in the other groups, however, the older interviewees indicated that they were interested in particular dimensions of the welfare system. For example, they were logically much more aware of how the pension system worked and to what pension they were entitled.

*So, actually my frustration is that I am barely accruing any pension – that is different in Spain, very different in Spain. You have a job and you make 600 or 500 or 1,000 a month, then you are entitled to pension on that 1,000. Here in the Netherlands it is not like that. I have the right to a pension but let's say that [uhm]... the 'old age pension' is up to 750 and I make 1,000, then I am only building a pension for the 250 – that is really very little (Profile 3, NL-19).*

However, if they were sometimes more aware than the other two groups about the details of their pension and transferability rights after migration, they were not necessarily aware of the pension system in the destination country *before* migrating. At the time of migration, having sorted a secure source of income before migrating appeared to be more important – their more immediate needs to secure enough financial resources to provide for their children's education or to pay the mortgage of their property in Spain were more important than any future pension arrangements. The welfare benefits of the sending country may be helpful in making it through the first phase of staying abroad.

*I quit my job in April... [in order] to receive the job-seeker's allowance [in Spain] some months in the summer period... meanwhile I could look for a job [in England] ... and she [the daughter] goes to London in September... and me, I move to wherever I find a job (Profile 3, UK-65).*

Instead of relying on the welfare system to make the move with an income, the interviewee and her husband considered two countries of destination simultaneously and finally moved to the one that offered the more-straightforward way to move with a job. The first option was Norway, where the husband could work as a bus driver. However, before migrating, he needed to learn a basic level of Norwegian and pass a language exam, which would take him three or four months. Instead, they decided to move to London, where the couple had Spanish friends; they therefore knew the city because they had been there as tourists and the husband could start working almost immediately in a job that one friend had arranged for him. They did not consider the differences between the British and the Norwegian welfare systems.

Compared to our two other groups, interviewees who migrated at an age closer to retirement clearly more often balanced the advantages and inconveniences of staying in the UK until – or returning to Spain before – the age of retirement. We identified three main topics that they considered in their ongoing decision-making: first, the cost of living and the quality of life that they would have in each country; second, the advantages of earning part of their pension in pounds sterling which, at the time of our study, was still somewhat higher than the euro; and, third, the extent to which they could rely on the Spanish pension system. As one interviewee indicated, for example:

*Let's be sincere here. I think nobody is going to have pensions in Spain in 20 years. If they get it, it'll be half of what they have saved. I haven't said it – the Minister of the Economy said it, three days ago. The fund has ended – there isn't one anymore, they've had to use it. Here I am saving from my wages each week, little by little. I know I can transfer from there, the same as with the P60 when you go to Spain, although I don't know what it is exactly (Profile 3, UK-79).*

Altogether, this illustrates once again the role that welfare systems can play in migration decisions – in this case the decision to return or to stay in the country of destination. For some interviewees, the uncertainty regarding the possibility of securing themselves an income upon retirement has increased following the EU referendum in the UK and the lack of clarity on the consequences of Brexit in the transferability rights of EU migrants (up until today). So here, too, it seems that their specific life stage influences their interest in different welfare aspects and, particularly, improves their knowledge in specific domains that are relevant for people in this life phase. This is especially the case for retirement benefits.

Our research also suggests that the various receiving states experience differentiated challenges with regards to migrants and welfare. The relatively 'new' immigration countries such as Poland do not have large numbers of older migrants and therefore the political focus may be on other aspects of welfare and migration such as childcare support. In the case of Western European countries, where many migrants experience the transition from working life to retirement, the problems of policy-building and responses seem different and more attention if given to the issue of transferability of pensions schemes.

## Conclusion

The link between migration and welfare features on both the political and the scientific agenda. Nevertheless, our current knowledge of the role which the different welfare arrangements between countries



might play on migration decisions over the life course remains quite limited. Existing research largely adopted a quantitative approach, linking the direction of migration flows to welfare-state indicators. These studies generally find little evidence for the welfare magnet hypothesis. Qualitative approaches, however, are rarely adopted in the literature. This is unfortunate as such an approach allows us to gain a more in-depth understanding of the subtle and eventually secondary role which welfare considerations might play in migration decisions. In this paper, we have provided one such more-nuanced understanding. We (re)examined the links between migration and welfare through a life-course perspective centred on individual micro-level narratives, focusing on the experiences of Spanish migrants who moved to the Netherlands, Norway, Poland, Portugal and the United Kingdom. We were particularly interested in unpacking the relationship between migration decision-making and welfare considerations, taking into account the welfare arrangements both in potential destination countries and in the origin country to see whether there is variation across the life course. Our expectation was that, depending on the specific life stage at which a migrant is situated, some welfare arrangements might be more relevant and/or important than others throughout the migration process. Our contribution indeed suggests that welfare systems can play a quite subtle role in migration decision-making processes as well as the importance of considering the life phase in which a migrant is situated when studying the links between welfare and migration. Based on our analysis, we draw the following conclusions.

First, our findings provide little evidence for the welfare magnet hypothesis among Spanish intra-EU movers, regardless of the stage in the life cycle. There was only one interviewee who explicitly referred to welfare arrangements as a primary motivation for choosing a particular destination. Second, although welfare arrangements do not seem to play a major role in the decisions of our interviewees to leave the country of origin, they do contribute to structuring the migration process. Interviewees either in the phase of family formation, parenting, or retirement seemed to be more likely to consider education, healthcare or pensions in their migration decisions. In later life phases, it appears that Spanish intra-EU movers are more interested in getting information on what will happen in terms of welfare after they move or if they decide to return to Spain, in order to secure access for themselves and their families. Among the younger interviewees, welfare considerations were much less present in their narratives, although they sometimes referred to them indirectly – such as when they report how they can sometimes profit from welfare arrangements in both the country of origin and of destination. Third, the decision to stay in the host country may become easier when there is the possibility of using the welfare systems of various countries simultaneously. The Spanish migrants we interviewed often seemed to be reluctant to rely entirely on the welfare regime of the destination country and to lose access to the welfare state in their country of origin. Instead, our findings clearly indicate that many Spanish migrants combine formal and informal welfare arrangements, in both the destination and the origin country. Such practices of transnational ‘welfare bricolage’ seem to be widespread among our Spanish migrant interviewees. This finding also indicates that merely focusing on the destination country’s formal welfare-state arrangements is not sufficient for understanding the link between welfare and migration. Our findings show that it is more fruitful to focus on both formal and informal arrangements, including the countries of origin and of destination.

The excessive emphasis on benefit tourism in migration studies in recent years has distracted researchers from examining the other, more-nuanced ways and mechanisms which connect the migration process and welfare arrangements. Our research documents self-reported motivations (internal explanations, personal narratives and interpretations of the significance of welfare). It examines how migrants describe migration decisions in their own words and the role that welfare played in those decisions. Migrants generally take some welfare factors into account in their migration decisions but

they are not equally cognizant of this fact at the various life stages. Our examination of migrants' subjective narratives about welfare, the quality of life defined as 'easy way of living' and the security suggests that younger migrants are less likely to report how the welfare system structures their migration trajectory. Migrants with families and retired migrants are more aware of how formal and informal welfare shapes their opportunities and trajectories. This does not mean that migrants make their decisions solely on the basis of available state benefits. It instead shows that migrants take a variety of elements into consideration when making migration decisions.

In studies of the migration–welfare nexus, the political and academic overemphasis on migrants who take advantage of the financial benefits of the host state shifted the necessary attention away from the important broader welfare considerations of migrating individuals. In contrast to heated debates in some EU countries about European migrants being attracted by generous formal welfare arrangements, we found little evidence for the classical welfare magnet hypothesis for the case of Spanish intra-EU movers. Welfare arrangements certainly do not figure among their primary motivations for moving across Europe. Nevertheless, welfare arrangements clearly matter for the whole migration process, even in the case of employable, highly skilled and entrepreneurial individuals. Since welfare is significant for migrants at various stages of life, (restricted) access to specific arrangements and earlier experiences with another welfare system may greatly contribute to the strategies of Spanish intra-EU movers. Our research proves that it is essential to study the welfare aspects of migration in an in-depth manner because they set the context for the mobility process, even in the case of migrants who are far from 'benefit shopping' and who move for reasons other than the search for welfare benefits.


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No conflict of interest was reported by the authors.

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## Note

<sup>1</sup> <http://www.bbc.com/news/world-europe-28955443> (accessed: 10 December 2021).

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# The Adaptation Strategies of Highly Skilled Latvian Migrants: The Role of Pre-Migration Cultural Capital and Typical Pathways to Labour-Market Upper Positions

Inese Šūpule\* 

*This article analyses the strategies of adaptation used by highly skilled Latvian migrants to make the best of their situation abroad. As empirical data, 26 semi-structured in-depth interviews with highly skilled Latvian nationals in finances, management, IT and the health sector are analysed. The study reveals how migrants negotiate the value of their cultural capital in the new country's labour market. Different adaptation strategies are typical for the pre-migration phase, the phase of transition and initial settlement and of establishment in the host country. The main conclusion of the study is that pre-migration cultural capital (education, work experience, language knowledge and general and specific skills) is important but not sufficient to be successful in new country's labour market – in the UK, Germany, Norway and the USA. The labour-market outcomes are a result of the interplay between migrants' individual resources and decisions on extensive investments in country-specific human capital and structural constraints – such as typical recruitment patterns in a particular occupation and host country.*

*Keywords: highly skilled migration, transferability of human capital, strategies of adaptation*

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## Introduction

Any job applicant, whether native or migrant, in any context, has to adapt to the realities of the labour market in which they participate. However, migrants are often less informed about the realities of the labour market in the receiving country and thus face the problem of the transferability of human capital (Csedö 2008; Emilsson and Mozetič 2019; Erel 2010; Friedberg 2000; Guhlich 2017; Liversage 2009; Nohl and Ofner 2010; Nohl, Schittenhelm, Schmidtke and Weiss 2006; Nowicka 2006, 2014). This is particularly relevant for highly skilled migrants. The knowledge and skills of a highly qualified professional may be assessed differently in the host country than in the country of origin. The perceptions of a good education and qualification standards vary from country to country, as has been found by many migration researchers (Ariss and Jawad 2011; Bauder 2005a, b; Erel 2010; Nohl *et al.* 2006; Weiss 2004). Due to the problem of the transferability of human capital, migrants accept jobs which are not congruent with their education and skills. Employed highly skilled immigrants are almost twice as likely as their native peers to be overqualified for their job (OECD/EU 2015). Recchi and Triandafyllidou (2010) have found that there are two different migration streams in operation within the EU. While EU-15 citizens who relocate to another EU member state are more likely to get jobs at the upper end of the socio-economic hierarchy, A8 (the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia) and A2 (Bulgaria and Romania) movers are comparably less successful and often face downgrading and brain waste.

As found by Csedö (2008) in her research on Eastern European migrants in London, only those who managed to present themselves in the best possible light, for example, were well-prepared for job interviews and were provided with recommendations from industry-relevant and recognisable specialists, were able to secure highly skilled jobs. These findings open up the issue of the different strategies that highly skilled immigrants choose in order to adapt to the realities of the host country's labour market. In response to this, the article analyses how Latvian migrants adapt to realities abroad, which obstacles they face and how they use their knowledge and skills. The study is based on a tradition that looks at the role of cultural and social capital in migration processes. The aim of the study is to find out the extent to which pre-migration cultural capital is important in finding a job, as well as what the role is of social capital. Second, the study analyses how migrants obtain host-country-specific social and cultural capital, including both institutionalised cultural capital (academic credentials or professional qualifications) and the embodied cultural capital (a person's means of communication and self-presentation, acquired from the national culture). Third, the study analyses the obstacles which highly skilled migrants face, including prejudice towards Eastern Europeans.

The study focuses on the experiences of Latvian migrants in finance, management, IT and the health sector and includes not only those migrants who received their educational titles in Latvia but also those who have received their educational certificates abroad or in the host country. This enabled the analysis of different fields and the comparison of the differences. As empirical data, 26 semi-structured in-depth interviews with highly skilled Latvian nationals are used. Adaptation strategies among highly educated Latvian migrants are analysed in the context of four different countries (the UK, Germany, Norway and the USA) to find out if there are any differences. These countries have been chosen because they have the highest proportion of highly qualified Latvian migrants. While the UK and the USA are English-speaking countries, Germany and Norway are non-English-speaking countries with regulated markets – open, however, for intra-EU migration. Potentially, different host countries provide different contexts and challenges of intercultural adaptation. The term 'highly skilled' has been used throughout this article to

refer to those who have completed tertiary education. This has been accepted as the most widespread and convenient academic practice in this field (Csedö 2008).

The article begins with the theoretical background of the study and a literature review and sheds light on the concepts of 'human capital', 'cultural capital' and 'social capital'. It presents the main findings of previous studies characterising the career trajectories of highly skilled migrants. The third section provides the contemporary migration trends of Latvians and reports on the data and methods used in the study. After presenting the results of the analysis, the article closes with conclusions.

## Theoretical background

Over the last 20 years, the concepts of cultural and social capital have played a special role in the study of migration processes. Several studies on the migration of highly qualified professionals use the concept of human capital. These concepts are closely related and important, especially in research on the highly skilled. Human capital is understood as a person's knowledge, habits and personality traits, including creativity, which is expressed as the ability to create economic value as a result of their employment. In other words, human capital refers to the totality of knowledge and skills inherent in a person. According to the theory of human capital, the migration of highly qualified specialists is related to potential migrants' rational calculation of how best to recover the funds invested in education (Becker 1993; Massey, Arango, Hugo, Kouaouci, Pellegrino and Taylor 1993). The concept of cultural capital is essentially similar to that of human capital, with the difference that cultural capital is defined in a specific social and cultural context. Cultural capital refers to skills, education and knowledge acquired in the process of socialisation (Bourdieu 1986). According to Bourdieu's theory of capital, social capital is 'the aggregate of the actual or potential resources which are linked to possession of a durable network of more or less institutionalized relationships of mutual acquaintance and recognition' (Bourdieu 1986: 247). Putnam (2000) compares two forms of social capital: bonding social capital – which refers to social networks between homogeneous groups of people, for example, family or closed social groups – and bridging social capital, which develops within social networks between socially heterogeneous groups.

Studies on the recognition of the cultural capital of highly qualified migrants have found that it depends largely on the migrants' profession (Nohl and Ofner 2010; Nohl *et al.* 2006). In areas where there is an international labour market, cultural capital acquired in the country of origin is also more often accepted internationally. In international business in particular and the information and communications technology sector, cultural capital can be utilised regardless of where it was obtained (Erel 2010; Nohl *et al.* 2006). These findings are consistent with those of other studies which see that particular groups can more easily transfer their skills between national contexts. For example, Nowicka (2006) emphasises that the majority of professionals who move within the networks of corporations and international organisations are liberated from nation-state commitments. Bauder (2012) argues that academics and inter-firm transfers are a more privileged group in mobility.

Here it should be stressed that, in general, the legal status of EU nationals is more favourable and provides for more freedom of movement within the EU (compared with the USA). The recognition of professional qualifications laid down in Directive 2005/36/EC enables the free movement of professionals such as doctors or architects within the EU. At the same time, there is no automatic EU-wide recognition of academic diplomas; however, there is a system in which your degree can be easily compared and recognised. Nevertheless, Eastern European professionals and graduates still have reservations about being accepted as integral players with full rights in Western European markets (Csedö 2010). As stressed by Schuck (2000: 188–200), 'law on the books' differs from 'law in action' and 'law



in their minds'. Besides the different perceptions, objectively the same formal qualifications can vary significantly from country to country and be based on different curricula. In this article, the focus is more on the perception of the highly skilled migrant professionals about their experience on the foreign labour market and less about the legal regulations governing the recognition of education certificates or the comparison of differences in education systems.

Previous studies show that many highly skilled migrants are not successful in gaining employment at the expected level and suffer from a process called skill downgrading, de-skilling or brain waste, because – despite their levels of education – not all are necessarily regarded in the country of destination as highly skilled (Bertoli, Brücker, Facchini, Mayda and Peri 2012). Migrants accept these conditions because the socio-economic opportunities in the host country are better than those in their countries of origin (Waters and Kasinitz 2013). Many studies evidence the tension between self-presentations and the regulatory structures of migration regimes, including host-country-specific social and cultural capital (Erel 2007; Nohl and Ofner 2010; Nohl *et al.* 2006). Any migration, including that of highly qualified professionals, can lead to a 'transition penalty'. In order to be recognised, an individual must make a very great effort (Lochhead 2003; Zikic, Bonache and Cerdin 2010).

In a study on highly skilled Hungarian and Romanian migrants in London, Csödö (2008) highlights the importance of social context and immigrant agency in the assessment of skills and human capital. Those migrants, in particular, who do not relocate with the help of their employer but have to find employment on their own, have to possess the necessary skills and language proficiency to negotiate the value of their qualifications in the destination country's labour market (Csödö 2008; Koikkalainen 2013). This does not mean that the highly skilled do not look for work through their social networks. As Csödö (2010) identifies in her study, social networks contribute to the sorting of migrants with similar levels of qualification into more-polarised labour-market positions, depending on the composition of these networks. While professional networks facilitate access to higher professional and managerial jobs, ethnic networks channels well-educated migrants into unskilled or semi-skilled positions and rarely comprise co-ethnics with influential positions.

On the basis of life-story interviews with high-skilled Eastern Europeans in Denmark, Liversage (2009) proposes a typology of five paths that reflect different types of labour-market incorporation for high-skilled immigrants. These are the 'path of re-entry', 'path of ascent', 'path of re-education', 'path of re-migration' and, finally, the 'path of marginalisation'. The 'path of re-entry' refers to those migrants who were able to re-enter with the profession they had carried out prior to migration and use their initial qualifications. The 'path of ascent' is the entry to the labour market in a less-qualified position than the migrant's initial qualifications and working one's way up. Another possibility, the 'path of re-education', refers to gaining an education in the host country. This is an alternative way to overcome professional closure and reach a goal of working in the field of one's expertise. The 'path of re-migration' is the return to the country of origin and the continuation of the career commenced there prior to migration. Finally, the 'path of marginalisation' relates to the situation where the migrant remains unemployed or takes on a low-level position.

Nowicka (2014), in her study, has demonstrated the complexity of a process of skill validation in relation to the historical socio-economic context and migrant transnationalism. She highlights that migrants are agents capable of developing new skills upon arrival in a host country. However, Nowicka argues that 'the way skills are defined, acquired and valorised in the country of origin has an influence on how migrants mobilise them in the receiving society and on how they perceive their chances for negotiating strong positions on the labour market of the host country' (Nowicka 2014: 173)

The study by Emilsson and Mozetič (2019) on highly skilled Latvians and Romanians in Sweden has shown that intra-EU mobility in many cases leads to prolonged labour-market entry and downward socio-economic mobility. They have identified three main career trajectories of highly skilled young Latvians and Romanians in Sweden: matching, re-skilling and de-skilling. The matching group represents those who are hired into high-skilled jobs, matching their educational background and previous career trajectories. Usually, they work in English-speaking environments at universities and multi-national companies. However, as found by Emilsson and Mozetič (2019), the majority of young highly skilled Latvians and Romanians in Sweden do not have high-skilled jobs upon arrival. The re-skilling group enters into high-skilled employment after several years of investment in country-specific human capital. The de-skilling group ends up unemployed or in less-productive work. The re-skilling group consists of those who have decided to acquire a university degree in the host country, although they already have fulfilled their education in the country of origin. Studying in the country of destination paves the way into the labour market of that country because it increases local social capital and knowledge about the realities of the labour market there (Emilsson and Mozetič 2019; Nohl and Ofner 2010). This is one form of migrants' personal contribution to skill validation and negotiation in the host country. However, other pathways exist and need to be explored in detail. Bearing in mind the findings of previous studies on highly skilled migrants' adaptation, this chapter examines the adaptation strategies of highly skilled Latvian migrants and the obstacles which they face and scrutinises the construction of their cultural and social capital abroad.

## Research context and methodology

### *Research context*

Latvia, like Lithuania and Estonia, has a relatively small and declining population. Since 1990, the country's population has decreased by more than 700,000 persons as a result of emigration and low birth rates (CSB Latvia 2020a). Before Latvia's accession to the EU, emigration from the country occurred at quite low rates. EU accession and the subsequent opening of the labour markets of the UK, Ireland and Sweden contributed to the influx of emigration and the outflow from Latvia has almost tripled (Hazans 2019). The 2008–2009 economic crisis in Latvia and its economic and social consequences were the main reasons for the last emigration wave. After 2012, emigration flows decreased; however, the number of emigrants still slightly exceeds the number of immigrants in Latvia (CSB Latvia 2020b). Higher salaries abroad are an important reason for most labour emigrants as destination countries usually offer better working and living conditions compared to Latvia (ICF 2018).

In 2018, according to the official statistics, 11.8 per cent or 149,000 Latvian citizens aged between 20 and 64 lived in one of the EU/EFTA countries outside Latvia (Eurostat 2019). In 2008, only 4 per cent of Latvian citizens aged 20 to 64 lived in an EU country outside Latvia. By comparison, the largest percentage of citizens living in an EU country outside their country of origin in 2018 is in Romania (21.3), Croatia (15.4), Lithuania (14.5), Portugal (13.6) and Bulgaria (13.3 per cent). Latvia ranks sixth after Bulgaria. Of all Latvian citizens aged 20 to 64 who lived in an EU country outside Latvia in 2018, 31.0 per cent had higher education (ISCED 5–8). In 2008, this proportion was 17.1 per cent. According to Eurostat statistics, the proportion of highly educated citizens living outside Latvia is similar to that of highly educated citizens living within the country (32.3 per cent). In general, we can conclude that the

share of highly educated Latvian emigrants in other EU/EFTA countries has significantly increased over the last 10 years.

Latvian emigrants in EU/EFTA countries have a higher employment rate (82.8 per cent) than Latvian citizens (76.8 per cent), which indicates that the former are mostly labour migrants (Eurostat 2019). Among highly educated citizens, employment is higher both in Latvia and abroad although, in Latvia, it is slightly higher among highly educated ones (88.9) than abroad (83.8 per cent). The most popular destination countries for Latvians are European Union member states (the majority head to the UK, Ireland and Germany) as well as the European Free Trade Association (EFTA) countries – mainly Norway (CSB Latvia 2020b). Unfortunately, the statistical information on emigration from Latvia to the USA is incomplete, therefore a special study to determine the size of the Latvian diaspora and emigrants was conducted in 2020 (Hazans 2020). However, it does not provide information on the level of education of emigrants to the USA, only an overall estimate of the US diaspora. The results of the study show that there are about 90,000 people of Latvian origin living in the US, of whom about 20,000 have emigrated in recent decades.

According to the Central Statistical Bureau of Latvia, Latvian emigrants are generally very young, 55 per cent being aged between 20 and 39 years in 2018, with slightly more men (54 per cent) than women (CSB Latvia 2020c). The proportion of highly educated people leaving Latvia increased significantly between 2009 and 2011 (Hazans 2018) and are over-represented in Science, Mathematics, IT, Medicine, Humanities and the Arts. Over the past decade, the nature of emigration has changed from short-term to the permanent emigration of the whole family, with minorities and university graduates over-represented (CSB Latvia 2020d; Hazans 2018).

### *Data and methods*

In order to understand the relationship between Latvian highly skilled emigrants' knowledge and skills on the one hand and the expectations and opportunity structures of the labour market on the other, 26 in-depth interviews with them were conducted. Of these informants, 7 had emigrated to live in the UK, 7 to Norway, 6 went to Germany and 7 to the US. All had left Latvia between 1991 and 2016. All informants have a degree and work experience in the field of finance, management, IT or the health sector. The youngest respondent was 29 years old and the oldest 65. The majority of interviews (24) were conducted in Latvian but, for two, Russian was spoken. The longest emigration period among the respondents interviewed was 27 years, while the shortest was 2 years. All interviews were carried out between November 2018 and June 2019. The interviews were audio-recorded and then transcribed and the average length was 60 to 90 minutes. Participants were recruited through different networks, social media and snowballing. Behind the interview citations information on participant's tracking code, gender, profession, country of emigration and time of emigration is provided.

The questions focused on informants' educational and employment trajectories before and after migration and included the following topics: education motivation and experience, career paths, migration motivation and experience, perceived work discrimination and future plans. To analyse the interviews, a thematic coding approach was used. First, the units of analysis were identified and then they were grouped according to themes (Strauss and Corbin 1998).

Since the focus of the study was on the strategies of adaptation of highly skilled Latvian migrants, the typifying models were sought in the analysis. After the repeated reading of transcripts, the strategies the most characteristic of the migration stages proved to be the most appropriate for structuring the analysis.

To compare the experiences of those migrants who received their educational titles in Latvia with those who received them abroad, two cases are examined in depth. Both refer to young male emigrants who were successful in London, a city famous as a magnet for workers from around the world in diverse financial and professional services. One of the informants worked in the financial sector, the other in digital marketing; however, both can be regarded as London young professionals.

Schematic images (Figures 1 and 2) are used to depict their educational and work trajectories, highlighting migration events and 'transition points'. They include a sequence of events related to education and work at a particular time and in relation to a specific place or country. Such an approach allows for the schematic depiction of certain stages of socialisation and development. The following categories are used in the images to describe work trajectories: highly qualified managerial work (includes the status of a top manager or entrepreneur) and highly skilled paid work. Lighter and darker colouring are used in the pictures, with the lightest referring to a lower level and the darkest to a higher level of highly qualified workers. The terms Mc., Mg. and Dr are used to indicate the level of education acquired.

The schematic images also reveal the most important family events mentioned in the interviews in the context of professional migration and co-operation with Latvians, both in the home country and in Latvia (categories: family factors and professional co-operation with Latvia). Such an approach makes it possible to reveal the status of transitions in the different spheres of life and how the different sub-systems of society (work team, family, friends, professional and interest organisations, etc.) come into play at certain stages.

The study followed the key principles of voluntary participation, anonymity and confidentiality. Interviews took place only with the participants' informed consent. The data collected were carefully maintained and secured in adherence to regulations on the protection and security of data, including the anonymisation of interviews after the preparation of transcripts and the deletion of the audio files. In processing and analysing the data, all legal regulations regarding confidentiality were strictly followed in order to ensure that the anonymity of participants was being protected. Biographical details that could reveal the identity of the informants have been changed or omitted, as have the names used.

## Results

Analysis of the strategies of adaptation used by highly skilled Latvian migrants reveals that these vary at different stages of migration. We can distinguish adaptation strategies typical of the pre-migration phase, the phase of transition and initial settlement and the phase of establishment in the host country. The pre-migration phase here is understood as the period of time during which the orientation towards migration develops. The phase of transition and initial settlement describes the period of time during which the migrants find somewhere to live and their first job and acquire the language of the host country. Different adaptation strategies also characterise the phase of establishment in the host country, the beginning of which phase can be identified at the point in time when a migrant has found a certain stability in terms of housing, work relations, partnerships and social contacts.

### *Pre-migration*

Pre-migration adaptation strategies the most often take the form of more-or-less-intensive learning of the host country's language through courses or self-study, as well as seeking information and developing social contacts in the host country when preparing to leave Latvia or looking for work remotely. One of the longest stages of preparation identified in this study is three years. In this case, during the residency

in Latvia, the doctor purposefully prepared for his residency in the US, establishing contacts with foreign Latvians who helped him to prepare for the necessary exams, find a place of live and pass a scholarship:

*I started studying for the American medical exams – I passed them in two years. There were two steps. Each took one year and the third year was devoted to finding somewhere to live in America. So basically when I finished my residency in Latvia I started my residency in New York (20. Male, hospital doctor in the US, emigrated in 1997).*

In other cases, the preparation for leaving can be very short – for example, an IT specialist applied for a possible job and went to London two weeks after the Skype job interview and took up residence there:

*We communicated via Skype for an interview. They made an offer a week later, which I accepted. I wrote my resignation and two weeks later I landed in London on Saturday, found a place to live on Sunday and started working on Monday (9. Male, IT, the UK, emigrated in 2011).*

Typically, in the group of doctors interviewed, migration to the host country was related to residency in a university hospital. The interviews reveal how doctors looked for specific residency opportunities while living in Latvia. In all these cases, professional social contacts play an important role – it is international social capital which fosters their migration. Especially in the case of doctors, professional social networks often overlap with ethnic ones and doctors of Latvian origin help new colleagues to find places of residency. At the same time, there are also doctors among the informants who establish social contacts with professionals with no Latvian origin in the host country – achieved during professional conferences or during professional practice:

*I was in practice in Germany. There are very good, important publications in my field in German, so I have also been studying German extensively for the last two years. Therefore, the choice was clear to apply for a residency in Germany (29. Male, doctor, Germany, emigrated in 2012).*

All in all, the most typical strategies of highly qualified Latvian emigrants at this stage are related to language acquisition (the form of host-countries' embodied cultural capital), the identification of information about the host country and the establishment of social contacts (host countries' social capital). Emotionally, this period is associated with high expectations and doubts.

### *Transition and initial settlement*

The experience of highly skilled Latvian migrants shows that, in many cases during the transition and initial settlement, they have more or less institutionalised a kind of a novice phase. This refers to the postgraduate residency of physicians and to the youngest employees in the finance and IT sectors. In some cases this novice phase takes the form of a trainee programme – a way for highly skilled Latvian migrants to adapt their cultural capital to the expectations of their employers. Typically, the initial stage can be characterised by a lower salary, time-consuming and unpleasant tasks and learning to work hard on self-presentation. The process of learning the language of the host country continues during all phases of migration. Although most of the highly skilled Latvian migrants have some host-country language knowledge before migration, it takes approximately a year to feel free when communicating in the host-country language. For my informants, this applied in particular to the learning of German and

Norwegian. Although, as will be shown in more detail below, English-language skills are also constantly being improved and refined:

*I understood everything. But I had trouble with speaking. Words were missing. A year passed before I was able to talk freely* (29. Male, hospital doctor, Germany, emigrated in 2012).

In the case of Norway, to acquire the host-country's language, highly skilled Latvian migrants use the possibilities which the country provides, such as language courses for migrants. Usually the employer organises and supports migrants' participation in these language courses:

*I must thank my employer for being part of the one-year programme 'Norwegian Language Courses and History for Foreign Students'. A very effective programme that taught me the basics of language during the year. It was great support for the future. (...) During the year I was able to speak Norwegian freely. That was the beginning* (31. Male, financier/accountant, Norway, emigrated in 2011).

In-depth interviews with highly skilled Latvian migrants show that the process of validation of cultural capital is almost never straightforward and requires effort. Apart from language acquisition, in most cases, many hours are devoted to the improvement of the skills necessary for work. Particularly in the UK, the US and Germany, highly skilled Latvian migrants work very hard to be perfect in their field and to show that they are very good at what they do. In most cases, the working day lasts more than 12 hours and it makes no difference in which field – finance, management, IT or the health sector – the migrant works.

*The first half of the year was tough as, every evening, including Saturdays and Sundays, was devoted to improving skills* (9. Male, IT, the UK, emigrated in 2011).

*The beginning was quite difficult because, in the banking business, it is a trainee job from 9 to at least midnight, including on weekends. Work without stopping. You are not asleep all the time, you are tested to see if you can do it. The adaptation was as follows: four trainees started but two were recruited* (1. Male, entrepreneur in new technologies, the UK, emigrated in 2009).

High levels of overload and constant stress characterise the phase of transition and initial settlement and not everybody has the capacity to take it. Those who stay and are successful prove that they are psychologically strong enough to overcome this phase:

*The beginning was very difficult. I came to work at 5 in the morning and worked until 9 in the evening. That was a huge amount of information. Every day, I had to see some 30 patients and be able to report about them to the chief. After the first half of the year, I wanted to leave everything and return to Latvia. (...) Such enormous overload and constant stress. Under stress and responsibility, I couldn't even sleep. It was very difficult. Such is the state of pre-depression. I was also very demanding of myself* (29. Male, doctor, Germany, emigrated in 2012).

However, not everyone is strong enough to face difficulties while trying to integrate into the foreign labour market. For example, the interview with a Latvian psychiatrist who lives and works in the UK

reveals that there have been some cases of suicide among young doctors there. From July 2016, therefore, a support group was established by physicians from the psychiatry and psychotherapy sectors living abroad to support Latvian physicians living outside Latvia. This support group is formed by psychiatrists in four countries (Canada, Norway, Sweden and Great Britain) and they have established an on-call plan where the person checks their email once a day for two months. The need for this support group is justified by two reasons: the understanding that doctors belong to the risk group suffering high stress levels and their need to receive support while living abroad, where the usual support system may not be available if relatives and friends live in Latvia:

*But why did we do it? After the suicide of one young doctor [in the UK] who was also a member of the Young Doctors Association. (...) Why did it seem important to us to help doctors? Because WE are doctors and we know what that means, what is needed and what difficulties doctors face, especially in their careers. For most of us, we are also immigrants. We know all this too. We can help in the form of psychiatry or psychotherapy but, above all, we can help a person to find a way to solve problems and get support in the place where he or she lives (8. Male, doctor, the UK, emigrated in 2005).*

For most of the highly skilled Latvian migrants, it is very important to make new contacts among their colleagues or professionals in the field and to develop host-country social capital. In some cases, good relationships with colleagues are important for professional support; in other cases – in finding a new job. This corresponds to the analysis of Nowicka (2014) and her conclusion that the successful validation of skills in the host country depends strongly on the ability of migrants to produce new mechanisms for it – such as social networks that can facilitate access to certain jobs. In the context of different forms of cultural capital, the following quote reveals that a migrant needs to learn the embodied cultural capital – a person's means of communication and self-presentation – acquired from the national culture:

*It was important to find a mentor to help you find out and understand those important things. There was one who had started working a year before I appeared. We made friends and then he told me how to react to our partners, how to react to different people, how to behave properly. But at the same time, I had a difficult and conflicting relationship with other colleagues – they just wanted to do badly. They thought that trainees could be treated as they wanted: 'It's the job of trainees to do all the bad things'. Well, month after month it improved (1. Male, entrepreneur working with new technologies, the UK, emigrated in 2009).*

Finding a good job abroad takes considerable effort by highly skilled Latvian migrants. They send numerous copies of their CVs and participate in sometimes hundreds of job interviews. They work hard to have references for potential employers and try to find different social contacts and channels for obtaining work. In some enterprises, employees are rewarded if they suggest a new potentially good worker and therefore it is in their own interest to prepare their protégé to be successful in work interviews. According to the findings of this study, these are win-win situations and the new professional contacts foster fruitful results in the job search.

The in-depth interviews reveal different experiences related to the first job. There are informants who have developed their careers in the same organisation. Examples are in the field of health care, where a doctor has purposely chosen a high-level university hospital which offers interesting opportunities for research and professional development and where he has developed a good career. In other cases, the first job is perceived only as an initial springboard; in parallel with the job, new contacts, new

opportunities and more-interesting job offers are sought. Successful highly skilled Latvian migrants are aware that it is equally important to fulfil the tasks to a high standard and to present them professionally; learning to work hard on self-presentation and making contacts is a way to gain recognition:

*Being a good professional means two dimensions: being able to deliver the results expected and having people perceive you as a professional. If even you are the best in your field, if people don't know you, you will be very limited in your career* (9. Male, IT, the UK, emigrated in 2011).

An additional difficulty is that informants have learned to do certain things differently – in particular how to write and how to present themselves. Several indicated that it takes about a year to acquire a sense of a language; similarly, adaptation to the new environment takes about a year for some. Previous knowledge, education and work experience, in most cases, are not sufficient to be successful. Several informants indicate that they are neglected in the host country. The situation is special in London, the metropolis of financial and various services, where even similar experience in another city of the UK is not considered to be significant: 'One of the nuances of England is that, in principle, what you have done outside of London does not count' (9. Male, IT, the UK, emigrated in 2011).

Highly skilled Latvian migrants are aware that, in several countries – for example, in the UK or the US – the national and local realities are very different compared to those in Latvia and therefore a person's first years of emigration are devoted to understanding local realities in their particular field. 'I had that view at the time. To get started, you need to understand the market here. (...) You have to get in and understand how everything works here' (5. Female, international client manager, risk management and insurance, the UK, emigrated in 2008).

Many successful highly skilled Latvian migrants are supporting newly arrived Latvian professionals, helping them to adapt and to become acquainted with the system. This is a kind of mentoring process and, in this regard, Csödö's (2010) conclusions about ethnic social networks are not relevant because these are both professional and ethnic networks, not only ethnic networks. The institutional and personal support organised by doctors of Latvian origin has been very important in the career development of many young doctors, including our participants:

*It is clear that people who have grown up locally have a pretty big advantage because they know the system. They know the system from A to Z, they don't have to guess many things. So I'm keen to help the young doctors who come here because I know how difficult it was for myself because I didn't know what people there know* (8. Male, doctor, the UK, emigrated in 2005).

The interviews also reveal some barriers – regarding the career prospects of highly skilled migrants – to their taking leading positions. These barriers are based on ethnic prejudices and the tradition that leading positions are more suitable for local professionals. Highly skilled Latvian migrants with a successful professional career see that there are possibilities to develop a career if you are very good but it is more difficult to compete with local professionals to get executive positions.

*Cultural differences. It is a very large and thick wall that has to be passed through. It is extremely difficult at the outset. Unfortunately, this culture is one that does not let in people easily. At that moment when you are in, you just have to hold on (...) They make sure theirs are in the lead. Those below them are no longer as important as they will be led. But – the higher you want to climb, the more difficult the*



*wall is. (...) The English will always be more supportive of the English. You have to be very, very adaptable to be in this environment. In terms of behaviour, in terms of attitude. (...) That feeling of superiority is very common. Indirectly (5. Female, international client manager, risk management and insurance, the UK, emigrated in 2008).*

Less-successful Latvian migrants use more-radical expressions and say that the UK and Norway possess caste systems where hidden racism is a typical praxis. One of the informants in this study living in the UK has changed his surname from a typically Russian to typically British one. A returnee from Norway expressed her opinion that, to develop a successful career in Norway, her name should be changed:

*I was looking for a job in marketing, but I needed to change my name to get a job there. (...) Because the Norwegians are pushing theirs. In low-skilled jobs, they are very keen to take foreigners but, in highly skilled jobs, they only take their own citizens. To have a Norwegian name. I know many cases where Latvians change their first and last names to sound Norwegian if they want a better job. (...) Like the British racists who have a caste system, Norway has a caste system (36. Female, public relations, Norway, emigrated in 2006, returned in 2017).*

For many Latvian migrants, access to the local labour market is built through the formal education system in the host country and, after finishing university there, they are more prepared to start finding a job:

*It all started with the practice. At the university, I had to find a place for practice. I sat down on the internet and searched. (...) After graduating, I sat down and figured out which city I was going to. I decided to go to Berlin because Berlin is big, international, with start-ups. Then I just sent in my CV, I think I sent some 60–70 CVs. I also had very many job interviews (21. Female, IT, Germany, emigrated in 2004).*

According to the typology of Emilsson and Mozetič (2019), these migrants belong to the re-skilling group. According to Liversage (2009) this is a 'path of re-education'. Although studying in the host country increases the local social and cultural capital of migrants and paves the way into the labour market, this implies a prolonged labour-market entry.

### *Establishment*

The establishment phase is characterised by a certain stability of migrants in terms of housing, work relations, partnership and social contacts. However, the struggle to acquire even nuances of the local language continues, for some, even 20 years after emigration. For first-generation emigrants in most cases it seems very difficult to integrate in the host society:

*You have to grow with it. Those local sayings and expressions, its customs and its behaviour. How information is exchanged. If you, as a foreigner, try to infiltrate this environment, there is a constant struggle because it is very difficult to understand what they mean by it. I have had very good language skills for 20 years, but it is not enough (5. Female, international client manager, risk management and insurance, the UK, emigrated in 2008).*

Interestingly, highly skilled Latvian migrants work on their language pronunciation in order to sound less 'Eastern European'; at the same time they acknowledge that it is better to be a 'white' migrant in comparison with other ethnic groups:

*Prejudice is always on some level but it helps that I'm 'white' (laughs). People like my accent but, of course, appreciate my professionalism. I have taken the training to prevent my voice from sounding so categorically Eastern European. (...) But most people notice that I am not a local. In any case, there is a major cultural barrier. I do not feel internally psychologically like an American and never will (20. Male, hospital doctor, the USA, emigrated in 1997).*

The findings of my study – referring to the fields of finance, consulting, management and IT – suggest that making use of cultural capital by referring to the language of origin and a knowledge of the particularities of the country of origin can be observed mostly during the establishment phase. In most cases, only when migrants are informed about the realities of the labour market in the receiving country will they find the opportunities to develop their own business by referring to their language and country of origin.

*Both understanding and specific terminology. All this had to be learned. Gradually learning it, everything worked. The portfolio of Latvian clients began to develop. Many Latvians do all kinds of things there and accounting services are needed, mostly in construction. Then there is already a logical link between discussing and solving accounting and consulting issues in the native language (31. Male, financial accountant, Norway, emigrated in 2011, returned in 2018).*

*What we do is export consulting. Our main focus is on attracting partners. Our client group is small and medium-sized businesses. As we are a relatively fresh and new company, our main client group at the moment is Latvian or Baltic companies (4. Female, international business, Germany and the UK, circular migration).*

#### *Case study: Martin*

To illustrate the complexity and the diversity of educational paths and work trajectories, two life stories are provided here. Both cases refer to emigrants in the UK. Martin's story represents a case when university education has been acquired abroad, while Tom received his degree in Latvia. The beginning of Martin's life story is different from that of a large number of highly qualified Latvian emigrants, because he grew up in a family of diplomats (Figure 1). As a child, travelling with his parents, he studied at schools for the children of international diplomats and learned English well from an early age. However, the life of a diplomat in a particular host country is usually not very closely rooted in it, as it is known that, after a certain time, it will be necessary to move to another country or back to Latvia. After obtaining a general secondary education, Martin decided to study finance on an international study programme in English at a university in the Netherlands. Unfortunately, after his BA studies, it turned out that the job prospects were not very promising for him, because the Dutch labour market needed specialists who knew the Dutch language well. In this respect, his case is similar to the experiences of migrants in Sweden (Emilsson and Mozetič 2019), where preference has been given to the investment in general human capital within an English-speaking context but, in the end, this strategy is not helpful in finding a job in this particular nation state. After his BA, Martin returned to Latvia and worked for a year

in an international company that provides audit, tax and consulting services. There he met his future wife and further work and migration plans were made in connection with her professional and migration choices. Having set himself the goal of working in one of the major international banks, Martin decided to obtain a Master's degree in business and, at the same time, look for a job. One of the approaches to finding work is to start with an internship and then hope that, by showing yourself well, you will be offered a permanent job opportunity. However, during the Master's programme, Martin failed to find such an internship. After his MA in the Netherlands, Martin therefore decided to go to London, partly under the influence of his girlfriend because she had the opportunity to work there; so Martin also went to London and decided to look for a job there. He faced difficulties finding his 'dream job' because he had finished a 'non-target school', which is a school where few firms (or not even one firm) recruits for back or middle office positions. The division of target, semi-target and non-target schools is of the utmost relevance in the investment banking sector. Students coming from a non-target school have to put in considerable time and effort to earn a first-round interview with a firm. By making new contacts, learning from others how to look for a job and prepare for an interview, Martin found several jobs, the last of which, in London, corresponds to a highly qualified job focused on investing in new technologies.

*I decided I wouldn't give up. My girlfriend went to London, which also gave me the opportunity to go to London and participate in job interviews on the spot. Then I started communicating with people in the financial world who are called 'non-target'. That's when you went to a 'non-target' school and have a 'non-target' CV. I asked how they do it and the answer was writing to countless companies and trying to get interviews.*

It is important to emphasise that Martin's job search required a lot of effort, because a positive result can be expected only by writing to a very large number of companies. Only then will it result in many job interviews although, after this, there are very few real job offers. In the interview, Martin states that he has sent about 100 applications and participated in at least 50 different job interviews. In the company, which was the last one where Martin worked in London, he was recommended by an employee of this company, whom Martin managed to meet and get to know and who helped him prepare for the interview:

*I met people who already worked in those companies. In that particular company, if you, as a worker, recommend a person to the company and that person gets a job there, you get 7,500 pounds. So the guy I knew was interested in recommending me and preparing me for that interview. In the end, everything came together brilliantly.*

Like many Latvian emigrants, for the first six months Martin worked as an apprentice or trainee. After two years and three months of work, Martin resigned and returned to Latvia. The main reason was his wife's desire to return to Latvia. Another important reason was his exhaustion from hard work and a lack of free time.

Martin's story in the professional field shows how the career of a highly qualified professional can be formed when education is acquired in a country with a specific national cultural capital. Without learning the national language, it is very difficult to find a highly qualified job. Relatively better opportunities for such professionals to find work are in countries where the language of communication is English. Another feature of this story is that it explicitly shows the role of bridging social capital in finding and

keeping a job. It even helps to overcome obstacles connected with particular structural constraints – namely, recruitment patterns favoured in the financial sector.

**Figure 1. Schematic life story of Martin**

	2002	2008	2009	2011	2012	2013	2014	2014	2015	2016	2017	2018	2019
	LV / Switzerland / Canada		NL		LV		NL	UK			Returned		
Highly qualified managerial work												Start-up business (LV)	
Highly skilled paid work					Work (LV)		Work (NL)	Work (UK)	Work (UK)		Work (LV)		
Education	Studies in an international high school		Bc. (NL)			Mg. (NL)							
Family factors	Family of diplomats					Meet- ing his wife in LV		Wife working in the UK			Planned returned of family (LV)		

Notes: highly skilled Latvian, 28, specialisation in new technologies and start-up management, the United Kingdom, emigrated in 2009, returned in 2017.

### Case study: Tom

Tom's experience exemplifies the case when education has been acquired in Latvia and the first career achievements have been there too (Figure 2). His specialty is digital marketing and it is a combination of several fields of knowledge – namely finance, advertising and programming. After obtaining a BA and an MA in finance and carrying out work experience with IT projects and finance in Latvia in 2010, Tom was faced with the employer's desire to reduce his salary due to the economic crisis, which he did not like and made him think about looking for work abroad. He found his first job in London through his contacts with the youth organisation Junior Achievement. Tom's first job in London was not his dream job and, after fewer than two years at the company, he felt he had reached the career ceiling, so he began to look for new opportunities: 'I proved myself. I doubled my salary, I realised that the ceiling had been reached here'.

Tom found his next job through social networks obtained while living in London. He used the opportunity to train for a public performance at the Toastmasters club and there he also made acquaintances who informed him about new job opportunities. At the moment, Tom feels he has again reached a certain ceiling in his work and is considering what to do next. Going further in his field of activity involves a change of company, including a change of activity and possibly a change of country of residence but these decisions were still in the process of being made at the time of the interview:

*The company's team is the largest in London, probably in the world. In a linear trajectory in my discipline, the agency has nowhere to climb anymore and I have something to think about. Reaching Olympus in this industry is done. But now the existential question arises: What next? I am currently at such a crossroads in my professional life.*

In general, Tom's example describes a situation where higher education has been obtained in Latvia and is only partially related to a career in London. Tom's growth and career development are based on continuous self-development, both in direct work and in addition to work, for example, training in public

speaking in English or participating in training for young entrepreneurs. Thus, he invests in the development of host countries' cultural and social capital which, in turn, helps him to find a better job. This example also reveals that, for emigrants, co-operation with the home country and using the home country's cultural capital becomes relevant only at the stage when significant career results, stabilisation and recognition in the host country and internationally have been achieved (Figure 2).

**Figure 2. Schematic life story of Tom**

	2002	2004	2006	2007	2008	2009	2010	2011	2012	2013	2014	2016	2017	2018	2019
	LV						UK								
Highly qualified managerial work									Work (UK)		Work (UK)			Work (UK)	
Highly skilled paid work		Work (LV)	Work (LV)	Work (LV)	Work (LV)	Work (LV)	Work (UK)								
Education	Bc. (LV)				Mg. (LV)										
Professional cooperation with Latvia														Cooperation with branch in LV, conference in LV	

Note: highly skilled Latvian, 35, IT, the United Kingdom, emigrated in 2011.

## Conclusions

This study has highlighted the strategies of adaptation used by highly skilled Latvian migrants to make the best of their situation abroad. It reveals how migrants negotiate the value of their cultural capital in the new settings and develop host-country-specific social and cultural capital. As the value of cultural capital is defined in social interaction and in reference to the cultural context in question, successful Latvian highly skilled migrants actively constitute their cultural capital to fit in with the host country's requirements. Like other migrants, they learn how to use the correct job application formats, obtain references to provide to a potential employer, behave in an expected manner in the interview and use an appropriate language. The study shows that the degree of integration into local labour market may rise with time and the acquisition of host-country-specific social and cultural capital, including both institutionalised cultural capital (academic credentials or professional qualifications) and embodied cultural capital (a person's means of communication and self-presentation, acquired from the national culture).

Analysis of the work trajectories of highly skilled Latvian migrants shows that the first jobs on emigration are mostly in the positions of a trainee or apprentice, where a shorter or longer period of time is intended for the acquisition of a specific context and practice. This applies to positions such as junior specialist, trainee or apprentice, as well as an early residency in medical institutions. Following a traineeship or apprenticeship phase, characterised by intensive language learning, an internship and relatively low pay, these examples are followed by professional stabilisation and career development. As found in other studies, in some cases the adaptation strategies used by highly skilled Latvian migrants can cause prolonged labour-market entry.

Analysis of the strategies of adaptation used by highly skilled Latvian migrants reveals that these vary at different stages of migration: the pre-migration phase, the phase of transition and initial settlement and the phase of establishment in the host country. At the same time, the process of learning the language of the host country continues during all phases of migration.

For those Latvian migrants who are planning to gain a university education in the country of destination, the pre-migration phase is characterised by identifying a particular university and programme and then sending in an application and passing exams. For other migrants, the pre-migration phase depends very much on their profession. In many cases, there is a need to establish contacts and to have some references in order to gain a starting point in the host country.

The establishment phase can be characterised by a readiness to disseminate knowledge and understanding of the local labour-market situation. At this phase, highly skilled Latvian migrants are able to find opportunities to develop their own business – referring to the language and country of origin – and to use their pre-migration cultural capital.

Similar to the findings of Emilsson and Mozetič (2019), the results confirm that most immigrants have to invest in host-country-specific human capital to be successful in their career or, in Bourdieu's (1986) terms, they have to actively constitute their cultural capital to fit in with the host country's labour market. Their labour-market outcomes are a result of the interplay between their individual resources and decisions on extensive investment in country-specific cultural and social capital and the host country's structural constraints. Contrary to the assumptions of Emilsson and Mozetič (2019) that an English-speaking labour market requires less country-specific human capital, this article points out that country-specific language issues are also important barriers in the UK and the US. Among highly skilled immigrants, it is a challenge to acquire the highest level of English language skills or a particular North American or British accent.

The main conclusion of this study is that pre-migration cultural capital (education, work experience, language knowledge and general and specific skills) is important but not necessarily sufficient to be successful in the new country's labour market in the UK, Germany, Norway and the US. Those highly skilled migrants who work in the private economy as managers or consultants at the upper end of the socio-economic hierarchy have to enhance their cultural and social capital during the transition phase.


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No conflict of interest was reported by the author.

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# The Language-Based Recruitment of Migrants to Online Surveys with Facebook Advertisements: A Comparative Assessment from Three Geographical Contexts

Oleksandr Ryndyk\* 

*A handful of studies have used Facebook's advertisement platform – Facebook Ads Manager – to recruit migrants to online surveys. The main challenge facing migration scholars in designing effective advertisements has been to identify and accurately target migrants on Facebook. Researchers have used proxies, such as users' previous residence abroad, language(s) or interests, to infer their migration status. Despite some progress, there remains a need to better document and reflect critically on the accuracy of targeting migrants using such proxies. Contrary to studies which relied on users' previous residence abroad, this study used migrants' language (Polish) to target and recruit survey participants from among Polish migrants in Norway, Sweden and the UK. Focusing on a single migrant group across three countries, the goal of this article is to assess the accuracy of a targeting strategy which relied primarily on users' command of a language as an indicator of their migration background. Comparing the results against official migration statistics and the results reported in similar studies, the article provides a compelling case for researchers to prioritise users' language, rather than previous residence abroad, as the proxy for migration background for migrants whose language, such as Polish, is confined to the borders of a single nation state.*

**Keywords:** participant recruitment online, migration research, Polish migrants, language targeting, Facebook advertisements

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## Introduction

Response rates across different modes of survey data collection have been in decline for more than two decades (Curtin, Presser and Singer 2005; de Leeuw and de Heer 2002; Sheehan 2006; Stoop 2005). The modern pace of life, increasing urbanisation and the public's general saturation with and scepticism towards surveys are among the reasons why traditional strategies for participant recruitment, including posted questionnaires, telephone interviews (Curtin *et al.* 2005) and email surveys (Sheehan 2006), have become less effective. At the same time, rapidly expanding Internet connectivity, reaching nearly universal coverage in the most developed countries and growing fast across the rest of the world (Internet World Stats 2021), has allowed online social networks to grow rapidly in the past decade. This development encouraged researchers to recruit informants online (Kapp, Peters and Oliver 2013; Rife, Cate, Kosinski and Stillwell 2016).

The trend towards the recruitment of study participants via online social networks has proved successful in health, medical and psychosocial research (Kayrouz, Dear, Karin and Titov 2016; Pederesen and Kurz 2016; Thornton, Batterham, Fassnacht, Kay-Lambkin, Cate and Hunt 2016; Whitaker, Stevelink and Fear 2017). In particular, recruitment through online social networks has benefited research on hard-to-reach social groups for whom anonymity is crucial, such as sex workers, victims of family violence, HIV positive persons (Yuan, Bare, Johnson and Saberi 2014), young marijuana smokers (Ramo and Prochaska 2012), or supporters of conspiracy theories (Iannelli, Giglietto, Rossi and Zurovac 2018). Despite its potential for participant recruitment among hard-to-reach populations, the use of online social networks for recruiting participants to migration research is relatively new. This may seem surprising given that ethnic minorities and immigrants in Western countries have traditionally been underrepresented in social and demographic surveys for a variety of reasons, among which inaccurate or incomplete sampling frames, language barriers, irregular residency and cultural bias towards participation (Eisner and Ribeaud 2007; Feskens 2009; Feskens, Hox, Lensvelt-Mulders and Schmeets 2006). Another explanation of why online research overlooked migrants in the early 2000s might be the conception of them as less likely to have regular access to the Internet or sufficient computer literacy skills to participate in online surveys (Feskens, Kappelhof, Dagevos and Stoop 2010, cited in Kappelhof 2014). This, however, has changed dramatically in the past decade due to the mobile Internet's rapid penetration even across developing countries (Internet World Stats 2021). Making Skype calls, sending mobile remittances or simply staying in touch with family and friends through Facebook, Snapchat or Instagram has reportedly become an important part of migrants' daily lives (Cassar, Gauci and Bacchi 2016; Hunter 2015; King-O'Riain 2015).

### *Facebook's social network as a platform for migration research*

In the past few years, scientists have begun to explore the potential of Facebook for recruiting migrants to online research. Founded in 2004, Facebook is the world's largest online social network, with about 2.85 billion monthly active users (MAUs) and 1.88 billion daily active users (DAUs) as of March 2021. The company is also the world's largest advertisement platform and, in the first quarter of 2021, reported USD 25.44 billion in revenues from advertising (Facebook 2021). Facebook features a targeted advertisement platform – Facebook Ads Manager – which provides advertisers and researchers with tools to customise target audiences for their adverts. Researchers can use a wide range of criteria – for instance, users' socio-demographic characteristics (e.g. age, sex, education, language, country of residence and many more) – and special interests to tailor their ads for specific audiences. Based on the

target criteria, Facebook Ads Manager then estimates Potential Reach – in other words, the size of the target audience that the ad could potentially reach. The estimation of Potential Reach considers many factors, such as ad targeting criteria and placement locations, how many people have been shown ads on Facebook Products in the past 30 days and what type of content people interact with on Facebook (such as liking a Page), etc. Facebook warns that Potential Reach is not an estimate of how many people will see the advert, as this may change with time; nor is it designed to match census population or other sources. Notwithstanding, this rich and virtually free source of data has proved useful in research on stocks and flows of migrants (Dubois, Zagheni, Garimella and Weber 2018; Palotti, Adler, Morales-Guzman, Villaveces, Sekara, Garcia Herranz, Al Asad and Weber 2020; Zagheni, Weber and Gummadi 2017).

However, given that Facebook Ads Manager does not provide advertisers with a straightforward marker of users' migration background, migration scholars must resort to strategies that aim to infer such information with the help of other proxies, such as user's languages, interests and previous residence abroad, known as 'Lived in – country' criterion. The latter seems to have been prioritised in recent studies. Through applying the 'Lived in – country' criterion, formerly known as 'Expats – country',<sup>1</sup> Pötzschke and Braun (2017) succeeded in recruiting a sample of 1,103 Polish migrants from Austria, Ireland, Switzerland and the UK without using incentives and with a relatively low budget. Their study proved that the geographic targeting of Facebook advertising based on users' IP address is a reliable tool for sampling Facebook users in specific countries, claiming that 96 per cent of the recruited sample matched the target criteria. Moreover, they reported that almost half of the participants in their Facebook sample would not have been reached had they chosen traditional sampling methods. In another study, Dubois *et al.* (2018) combined user's language (Arabic) with the former catch-all category 'Expats(all)' as a proxy for migrants in Germany from Arab League countries. Similarly, Palotti *et al.* (2020) used the criterion 'Lived in – Venezuela' for estimating the recent stocks and flows of Venezuelan migrants in Latin American countries in the aftermath of the Venezuelan humanitarian crisis. In a more-recent study on political participation among Argentinian, Polish and Ukrainian migrants in Germany, Spain and the UK, Ersanilli and van der Gaag (2020) experimented with different strategies, using both language, interests and 'Lived in – country' criteria.

Despite some progress in this direction, issues related to accurate and reliable targeting persist in the field. For example, some studies seem to take the estimated size of their adverts' Potential Reach for granted. Such was the case for Pötzschke and Braun (2017), who used the 'Expats – Poland' criterion for the recruitment of Polish migrants in four European countries and reported Potential Reach figures ranging between just 27.8 per cent and 47.2 per cent of the official Polish citizen population in their respective countries of study. Similarly, Ersanilli and van der Gaag (2020), who targeted Polish migrants in five European countries using a similar strategy, reported significantly different Potential Reach estimates, depending on whether or not an additional criterion, known as 'Away from hometown', was applied. Hence, after they had removed this latter criterion, their figures jumped from 110,000 to 320,000 users in the UK and from 70,000 to 290,000 users in Germany (E. Ersanilli, personal communication, 21 May 2021). Other studies do not report Potential Reach altogether. Dubois *et al.* (2018), for example, compared the distribution of refugees (per km<sup>2</sup>) in the 16 German states from a report by the Brookings Institute with the distribution of their advert's targeted users per state. Despite reporting a near-perfect correlation between the two distributions (Pearson's  $r = 0.99$ ), the authors do not provide the Potential Reach either for Germany as a whole or for its states. In addition, there are other weaknesses in their approach. Firstly, the data from the 2016 Brookings Institute Report, which the authors refer to, concern all refugees accepted in Germany in 2015, whereas their selection criteria, set in 2018, targeted only the

Arabic-speaking 'expats'. Secondly, since Facebook does not differentiate between the categories of migrants and expats, the Potential Reach estimates, based on the 'Arabic + Expats(all)' specification, included both refugees and other categories of migrants. In other words, comparing the Potential Reach estimates of Arabic-speaking 'expats' with the statistics on *all* refugees in different reference periods may have led to inaccuracies, making assessment of their targeting strategy challenging. Similarly, Pallotti *et al.* (2020) found a near-perfect correlation between the geographical distribution of their Potential Reach estimates of Venezuelan migrants and the data from the January 2019 report from the Regional Inter-Agency Coordination Platform for Refugees and Migrants from Venezuela (R4V). However, they themselves pointed out the vulnerability of their strategy, noting that their Potential Reach figures of Venezuelans living across Latin America plummeted suddenly from 3.2 million on 14 March 2019 to just 2.4 million on 17 March 2019, after Facebook's algorithm 'Lived in – country' had been updated around 15 March 2019. Such issues raise legitimate concerns over the effects of applying different target criteria to the coverage of the targeted migrant population and, related to it, potential bias in the composition of Facebook-recruited samples. It requires researchers to better document and reflect more critically on the accuracy of their targeting strategies using different proxies for users' migration background.

#### *Goal and structure of this study*

This article is part of a larger migration research project which aimed to recruit survey participants from among Polish migrants who have settled in Norway, Sweden or the UK, specifically after the 2004 EU enlargement. When the original recruitment strategy, described later in the text, failed, a sponsored advertisement with Facebook Ads was launched. Instead of applying the 'Lived in – country' criterion, commonly used in similar studies as a proxy for migration background, this study chose users' language as a marker of their migration background. The study succeeded in collecting 5,639 complete and incomplete responses during the advertisement period of 50 days, where 93 per cent of the responses originated via Facebook. The main goal of this article is to assess how well this language-based targeting covered potential respondents and how the socio-demographic composition of the recruited samples reflected the demographic profile of the targeted migrant population across the three immigration contexts. The article is organised as follows. The next section describes the design and logic of the two recruitment strategies used in this study. Then the results of the Facebook recruitment strategy are presented in terms of its Potential Reach as well as the demographic composition of the recruited samples. In the discussion, data from official sources of statistics are used to critically reflect on both the target estimates of the Facebook ad and the socio-demographic composition of the Facebook-recruited samples in the three countries of study. Zooming in on the UK context, the targeting results of this study are then compared with those found in Pötzschke and Braun (2017) and Ersanilli and van der Gaag (2020) who used 'Lived in – country' criterion to target Polish migrants in the UK. Finally, the last section summarises the main findings.

## Methods

### *Recruitment strategies*

In this study, two strategies for participant recruitment were used. Given the project's goal to recruit Polish migrants living in Norway, Sweden and the UK, the initial strategy aimed to advertise the study in transient places, such as airports or onboard international flights. Thus, in April 2017, when Polish migrants travelled to Poland for the Easter holidays, a 3-week advertising campaign was launched with a low-cost airline which operated 61 distinctive routes and had over 250 weekly departures to Poland from Norway, Sweden and the UK. The campaign targeted all passengers flying on these routes between 1 and 21 April 2017 and had a total cost of NOK 176,000 (approximately, US\$ 21,000 based on the payment date's exchange rate). The ad consisted of a picture (see Figure 1) automatically placed in 113,114 self-printed boarding passes whenever the passengers checked in online and, additionally, in 113,082 booking confirmation emails whenever a relevant booking was made during the advertising campaign. The participants were promised free participation in a draw for prizes, including a trip worth PLN 10,000 (*circa* USD 2,800) and five iPads. The airline advertising strategy resulted in 181 complete responses.

**Figure 1.** Airline advertisement automatically placed on passengers' self-printed boarding passes



Note: The text in Polish says: 'Take part in our study and win a trip worth 10,000 zł or one of five iPad mini 16 GB! Learn more about the survey at the project's page famac-ankieta.com'.

On 21 April 2017, when it became clear that the airline strategy had failed, a targeted Facebook campaign was launched and ran for 30 consecutive days until 20 May 2017. The objective of the campaign was to generate traffic to the external website which hosted the survey. The campaign had a total budget of NOK 48,635 (*circa* US\$ 5,655 during the campaign's period). The Facebook ad was organised as an automatic auction aiming at the most link clicks at the best price and had a standard delivery type, normally used for automatic bid pricing. The campaign comprised of a single advert which targeted all Polish-speaking Facebook users aged 20–65+ located in Norway, Sweden and the UK at the time of the campaign. The Facebook ad was an 80-second video explaining the goals of the overall research project, with a short text in Polish about the eligibility criteria, prizes and the link to an external website placed above the video (see Figure 2). Once the user clicked on the ad, he or she was automatically taken to an external website where the survey was hosted. The ad was only placed in users' News Feed and nowhere

else (e.g. the right-hand side bar). Due to its dynamic affect, a video ad was deemed to be a more attractive alternative than a picture ad, as it automatically starts playing when it appears on users' screens. It was run on all types of device, including desktop computers, tablets and mobile phones. No other advertising platform outside of Facebook, such as Instagram or Audience Networks, was used. Due to privacy concerns and to protect respondents' identity, no tracking (e.g., Facebook Pixel) was used. The Facebook advertising strategy yielded 3,552 complete responses.

**Figure 2. Facebook advertisement featured in users' News Feed**



Notes: The text in Polish above the video reads: 'Are you from Poland and living in Norway, Sweden or Great Britain? Fill out our questionnaire on the topic of migration by latest 20 May (Saturday) and win a trip worth 10,000 zł or an iPad: URL link'. The headline in Polish next to the 'Learn More' button beneath the video reads 'Fill out the survey online here'.

### *Online survey*

The participants recruited to this study were invited to fill out a comprehensive web survey comprising 12 sections with questions ranging from participants' sociodemographic data and personal migration history to their employment situation and future plans. The survey, which received ethical approval by the Norwegian Centre for Research Data, did not collect participants' identifiable information. Should the participants have wished to, it was possible to submit answers anonymously without providing an email address. However, the survey did set cookies to prevent repeat participation. To minimise item non-response, most of the questions in the survey were mandatory, with the option 'Other' in case respondents found the answer options incomplete or irrelevant for them. Furthermore, backward navigation was enabled in case participants wished to go back and correct the answers they had provided in the previous sections of the survey. Finally, the flexible format of the survey layout was compatible with both mobile and stationary devices. Challenges typically associated with cross-national comparative surveys, such as different understandings of context- and culture-specific concepts among respondents

in different countries, were less relevant for this study as its target population comprised of Polish-speaking adults who had emigrated from Poland to Norway, Sweden or the UK. The questionnaire was drafted in English to allow the research-team members to comment and contribute to its development. It was then independently translated into Polish by two native-speaking translators. Asking survey questions in migrants' native language enhances question comprehension and facilitates the participation of those who would otherwise drop out due to insufficient proficiency in a foreign language. In addition, it eliminates the problem of different question wording in different languages. Finally, it serves as an additional screening tool that prevented non-Polish-speaking persons from participating. Given the responsive design of the survey, its length varied between 40 and 60 questions and it took respondents an average of 15 minutes to complete (median time: 11 min. 50 sec).

## Results

The survey instrument registered 6,072 records during the combined period of 50 days in April–May 2017, of which 63 (about 1 per cent) came in between 1 and 20 April when only the initial airline campaign was active. The remaining 6,009 records (99 per cent) came in between 21 April and 20 May 2020, only after the Facebook ad had been launched. Having subtracted the duplicates ( $n=19$ ) and the entries with information missing on all items ( $n=414$ ), the survey collected 5,639 complete and incomplete responses. On the last page of the survey, the participants were asked where they had learned about the survey. Among the 3,808 respondents who answered this question (from here on, complete responses), 3,552 (93.3 per cent of all) reported being recruited via the Facebook ad, 181 (4.7 per cent) via the airline ad and 75 (2 per cent) via friends/other. Given the goal of this article, only the results of the Facebook recruitment strategy will be presented and discussed in the following sections.

### *Facebook Ad's Target and Actual Reach*

At the time of the advertising campaign, the Facebook Ads Manager estimated that the Facebook ad could potentially reach up to 947,000 eligible users: 80,000 in Norway, 67,000 in Sweden and 800,000 in the UK. The Actual Reach in Table 1 shows that the number of unique Facebook users whose News Feed featured the advert during the campaign period was 43,347 in Norway, 40,982 in Sweden and 190,203 in the UK. Thus, the ratio of the Actual and the Potential Reach across the three countries of study ranged from 0.24 in the UK to 0.54 in Norway and 0.61 in Sweden, suggesting a deeper penetration of the ad among its target population in the Scandinavian countries. Over the course of the campaign, the ad was shown on average 3.47 times to 274,532 unique Facebook users who matched the target criteria, resulting in 953,730 impressions and yielding 9,296 unique link clicks (or 3.4 per cent of unique users). Estimating how well the target audience was responding to the advert, Facebook assigned the campaign a relevance score of 8 out of 10, suggesting a high relevance of the advert to its target population. The frequencies shown in Table 1 indicate that the advert was, on average, shown more often to the users located in Norway (4.05 times) and Sweden (5.27 times) than those located in the UK (2.96 times). With regards to the responsiveness of the target audience, it is interesting to see that users in Sweden were more likely to click on the ad (54.95 unique link CTR) than users in Norway (31.84 unique link CTR) or the UK (29.78 unique link CTR).



**Table 1. Effectiveness indicators of the Facebook advertising campaign by country**

	Potential Reach: <i>persons</i>	Actual Reach: <i>persons</i>	Ratio reached: <i>share</i>	Frequency: <i>times</i>	Impressions	Clicks	Link CTR	Unique Link Clicks	Unique Link CTR
Norway	80,000	43,347	0.54	4.05	175,569	1,639	9.33	1,380	31.84
Sweden	67,000	40,982	0.61	5.27	215,930	2,701	12.51	2,252	54.95
UK	800,000	190,203	0.24	2.96	562,231	6,278	11.17	5,664	29.78
<b>Total</b>	<b>947,000</b>	<b>274,532</b>	<b>0.29</b>	<b>3.47</b>	<b>953,730</b>	<b>10,618</b>	<b>11.13</b>	<b>9,296</b>	<b>33.86</b>

Notes: In advertising, *Impressions* colloquially refers to the total number of times an ad is displayed to its target audience and is the product of *Actual Reach* by *Frequency*. *CTR* stands for *Click-through-Ratio* and is calculated as the number of *Clicks* per 1,000 Impressions.

With 10,618 total link clicks yielded during the Facebook ad campaign, the cost per click can be estimated at NOK 4.58 (or US\$ 0.56), although this varied according to participants' gender (NOK 3.80 for women and NOK 5.33 for men) and across locations (Norway NOK 7.13, Sweden NOK 5.17, the UK NOK 3.66). The Facebook advertising strategy brought in 3,552 complete responses at a total cost of NOK 48,635 (or US\$ 5,655), resulting in a price of NOK 13.7 (or US\$ 1.6) per complete response. Based on the size of the Facebook-recruited subsample, the Facebook ad response rate can be roughly estimated at 1.3 per cent of the unique Facebook users to whom the advert was shown ( $n=274,532$ ), a figure which is likely to be underestimated, as it ignores all 1,831 partial responses with missing information on where the respondents learned about the survey, of which an overwhelming majority ( $n=1,822$ ) came in after the Facebook campaign had been launched. If the share of the Facebook-recruited responses in the total number of complete responses (0.933) is applied to the total number of partial responses which came in when both recruitment strategies were active, a further 1,700 partial responses are likely to have been recruited via the Facebook ad. When both complete and incomplete Facebook-related responses ( $n=5,252$ ) are factored in, the response rate of the Facebook ad was 1.9 per cent and the price per response was about NOK 9.3 (or US\$ 1.1).

#### *Demographic composition of the samples*

The composition of the Facebook-recruited samples is presented below with regards to their gender, age and geographical distribution across Norwegian, Swedish and UK regions and, finally, according to respondents' reported length of residence in their respective countries.

Facebook Ads Manager provides information about the Actual Reach of the ad and the demographics of its audience. Table 2 breaks down the numbers of Actual Reach and Link clicks on the Facebook ad among the different age groups. The vast majority of all clicks on the Facebook ad were performed by users aged 25–44 years (61 per cent of all female and 67 per cent of all male Link clicks), who represent the majority of the Polish adult population in the three countries of study (see discussion below). However, respondents aged 45 years+ were three to four times as likely to click on the ad as users below the age of 45 (see Link CTR figures highlighted in *italics*). Whereas those aged 18–44 years responded to the ad with 19 to 38 link clicks per each 1,000 reached profiles, users aged 45 years and older produced on

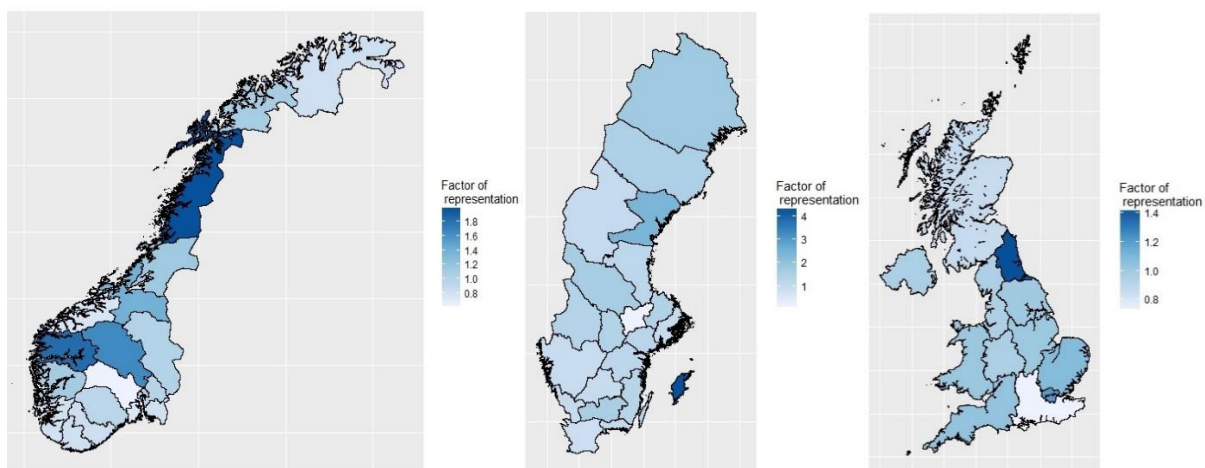
average between 61 and 101 link clicks for each 1,000 reached profiles, with certain variations between the genders and age groups.

**Table 2. Target population's responsiveness to the Facebook advert according to gender and age**

Age groups in years	Female				Male			
	Reach users	Share %	Link clicks	Link CTR	Reach users	Share %	Link clicks	Link CTR
18–24	14,065	10.4	271	19.26	9,654	7.0	198	20.51
25–34	54,727	40.5	1,589	29.03	51,339	37.3	1,540	29.99
35–44	41,749	30.9	1,591	38.11	57,029	41.4	2,089	36.63
45–54	14,065	10.4	935	<b>66.48</b>	13,938	10.1	1,046	<b>75.05</b>
55–64	7,416	5.5	590	<b>79.56</b>	3,964	2.9	400	<b>100.90</b>
65+	3,005	2.2	209	<b>69.55</b>	1,854	1.3	114	<b>61.49</b>
<b>Total</b>	<b>135,028</b>	<b>100.0</b>	<b>5,185</b>	<b>38.40</b>	<b>137,777</b>	<b>100.0</b>	<b>5,387</b>	<b>39.10</b>

As for the geographical distribution of the Facebook sample, the majority of the total 3,552 Facebook respondents resided in the UK ( $n=2,123$  or 59.8 per cent), followed by Sweden ( $n=812$ , 22.9 per cent) and Norway ( $n=591$ , 16.6 per cent). Just a tiny proportion of them (26 cases or 0.7 per cent of all) resided in countries other than the three under study. Figures 3a, 3b, and 3c illustrate how well the Facebook-recruited national samples reflect the official regional distribution of the Polish migrant population in the three countries of study. This is demonstrated by the factor by which the region's share of the Facebook subsample over- (factor values  $>1$ ) or underrepresents (factor values  $<1$ ) the respective region's actual share of the official Polish migrant population.

**Figures 3a, 3b, 3c. Maps illustrating overrepresentation or underrepresentation of regional shares of the Facebook-recruited national samples**



Notes: Overrepresentation (factor values  $>1$ ) or underrepresentation (factor values  $<1$ ) of regional shares of the Facebook-recruited national samples when compared with the official distribution of the Polish migrant population across the Norwegian (3a) and Swedish (3b) counties and the 2016 first-level NUTS regions of the UK (3c). Term 'migrant population' refers here to Polish-born persons in Norway and Sweden and Polish citizens in the UK.

Sources: SSB (2021a), SCB (2021c), and ONS (2017c). Maps created in RStudio with the ggmap package (Kahle and Wickham 2013).

Finally, Table 3 presents the composition of the Facebook-recruited national samples according to respondents' reported length of residence in their respective country. With 25.5 per cent of its respondents having reported living in Sweden for more than 13 years, the Swedish sample clearly stands in contrast to the Norwegian and the UK samples.

**Table 3. Distribution of national samples according to respondents' reported length of residence in the immigration country**

	Reported length of residence, <i>share</i> of the Facebook recruited national samples					Total
	< 1 year	1–5 years	5–9 years	9–13 years	> 13 years	
Norway	7.3	35.5	26.1	24.7	6.4	100.0
Sweden	6.2	29.4	17.5	21.4	<b>25.5</b>	100.0
UK	4.1	29.1	19.6	39.0	8.2	100.0

## Discussion

In this section, the accuracy of the language-based targeting strategy is appraised in a twofold manner. Firstly, official statistics on the Polish migrant population are used to evaluate how well the Facebook ad's Potential Reach covered the target population in the three countries of study. Secondly, the composition of the Facebook-recruited sample is analysed across the lines of migrants' gender, age, geographical distribution and length of residence in the host country. Since the Facebook advert only targeted users aged 20 years and older, the official statistics presented in what follows are restricted to Polish-born persons aged 20+, if not specified otherwise.

### *Coverage: Facebook's Potential Reach vis-à-vis the official immigrant population*

The Facebook advertising strategy in this project relied primarily on users' command of Polish (in both the ad and the survey) and the geographical location of the targeted users in Norway, Sweden or the UK. As of April 2017, Facebook estimated the Potential Reach for the advert to be 947,000 users: 80,000 in Norway, 67,000 in Sweden and 800,000 in the UK. Table 4 confirms that this study's Potential Reach estimates for the UK and, to large extent, Norway, corresponded well with the official statistics on both the Polish-born and the Polish citizen population but deviated considerably in the Swedish case.

**Table 4. Facebook advert's Potential Reach versus the Polish-born and Polish-citizen population in Norway, Sweden and the UK, 2017**

Country	Facebook Potential Reach as of 20 April 2017, users 20+ years old	Official Polish-born population, 2017, persons 20+ years old	Official Polish citizen population, 2017, persons 20+ years old
Norway	80,000	86,358	81,151
Sweden	67,000	79,835	41,014
UK	800,000	780,020	770,000

Notes: Norway's figures are as of 1 January 2017; the citizen figure excludes persons who have naturalised (SSB 2021a, 2021c). Sweden's figures are as of 31 December 2016; the citizen figure excludes persons with dual citizenship, of which one is Swedish (SCB 2021 b, c). The UK figures are estimates based on ONS (2017c) and the age distributions found in Hawkins and Moses (2016).

As can be seen, the Potential Reach in Sweden was 16 per cent below the number of Polish-born persons and 63 per cent higher than the number of Polish citizens. Migrants' age and naturalisation patterns are the two likely explanations here. Table 5 provides an overview of the age distribution among Polish-born persons in Norway, Sweden and the UK over 20 years of age. It is noticeable that the proportion of persons aged 65+ was significantly higher in Sweden (14.3 per cent) than in Norway (1.6 per cent) or the UK (2 per cent). Thus, among 79,835 Polish-born persons aged 20+ who resided in Sweden at the beginning of 2017, about 11,440 were 65 years or older. If we consider persons aged 50 and older, their share in the total Polish-born population, aged 20 or above, was 37.5 per cent in Sweden, compared to 16.8 per cent in Norway or just 10.7 per cent in the UK. It is, therefore, reasonable to suggest that, given that older persons are less likely to use social media, the deflated Potential Reach in the Swedish case is due to the relatively higher proportion of older migrants in the Polish-born population in Sweden.

**Table 5. Age distribution of Polish-born persons aged 20+ years in Norway, Sweden and the UK, 2017**

Age groups in years	Polish-born aged 20+ years					
	Norway		Sweden		UK	
	<i>Persons</i>	<i>Share</i>	<i>Persons</i>	<i>Share</i>	<i>Persons</i>	<i>Share</i>
20–29	14,946	17.3	11,608	14.5	208,265	26.7
30–39	35,208	40.8	21,766	27.3	380,650	47.5
40–49	21,668	25.1	16,541	20.7	109,203	15.1
50–64	13,135	15.2	18,480	23.2	63,962	8.4
65+	1,401	1.6	11,440	14.3	17,940	2.3
<b>Total</b>	<b>86,358</b>	<b>100</b>	<b>79,835</b>	<b>100</b>	<b>780,020</b>	<b>100</b>

Notes: Data retrieved from SSB (2021a, 2021c), SCB (2021b, c). Sweden's figures are as of 31 December 2016, Norway's as of 1 January 2017. The UK figures are estimates based on ONS (2017a, c) and the age distributions found in Hawkins and Moses (2016).

Further, the discrepancy between the Potential Reach and the Polish citizen population in the Swedish case (see Table 4) deserves further reflection. In general, statistics on foreign citizens are normally less suited to serve as proxies for immigrant population stocks as they tend to distort the numbers both downwards and upwards. On the one hand, when immigrants naturalise, they tend to be excluded from the official statistics on foreign citizens, especially in countries where dual citizenship is either not permitted, not recognised or not registered, to avoid double counting. Table 6 shows the distribution of the Polish-born population aged 20+ years according to the nationality they held as of early 2017 in Norway, Sweden and the UK. The Potential Reach for Sweden, being 63.4 per cent larger than the official Polish citizen population of 20+ years old, can be explained by the fact that the foreign citizen statistics exclude persons with dual citizenship, of which one is Swedish.

On the other hand, statistics on foreign citizens tend to overestimate the migrant population as they also include locally born children who have acquired their immigrant parents' citizenship at birth but are not immigrants themselves. In the context of this study, the citizen figures in Table 4 are very unlikely to include significantly high numbers of persons born to Polish parents in Norway, Sweden or the UK, since persons under 20 years of age were not targeted by the Facebook ad. For the opposite to be the case, such people must have been born in the respective country of immigration prior to January 1997 and must have acquired Polish citizenship either at birth or later, which is negligible given the low stocks of Polish migrants across the studied contexts at that time. To confirm this line of reasoning,

compare the total number of Polish citizens aged 20+ years old in Sweden (41,014 persons in Table 4) with the total number of Polish-born persons aged 20+ years old holding Polish citizenship in Sweden (40,557 persons in Table 6). Thus, only 457 persons out of 41,014 Polish citizens aged 20 and older living in Sweden as of early 2017 were not born in Poland.

**Table 6. Polish-born persons aged 20+ years in Norway, Sweden and the UK according to the nationality held, 2017**

Citizens of	Polish-born population, 20+ years					
	Norway		Sweden		UK	
	<i>Persons</i>	<i>Share</i>	<i>Persons</i>	<i>Share</i>	<i>Persons</i>	<i>Share</i>
Poland	81,151	94.0	40,557	50.8	744,020	95.4
The host country	< 5,207	< 6.0	38,778	48.6	< 32,000	< 4.1
Other countries	N/A	N/A	500	0.6	< 4,000	< 0.5
<b>Total</b>	<b>86,358</b>	<b>100</b>	<b>79,835</b>	<b>100</b>	<b>780,020</b>	<b>100</b>

Notes: Sweden's figures are as of 31 December 2016. Statistics Sweden does not provide information about dual citizenship for Swedish citizens. Norway's and the UK's figures are the author's own estimates based on SSB (2021a, b, c), ONS (2017a, b, c) and the age distributions found in Hawkins and Moses (2016).

Another issue concerning the accuracy of sampling frames is the risk of including persons who are not in the target population. Given that this study's Facebook recruitment strategy relied primarily on users' command of the Polish language and their location inferred from their devices' IP address, any Polish-speaking person who, at the time of the survey, happened to be in one of the three countries of study but did not reside there (i.e. Polish tourists, family members visiting from Poland) could access the survey had they been exposed to the Facebook ad. Given the fact that only 0.7 per cent of all respondents (26 out of 3,552 persons) who had been recruited to the study via the Facebook ad said they resided in countries other than the three of study, it is reasonable to conclude that the Potential Reach figures in this study are unlikely to include significant numbers of persons who did not belong to the target population.

This study's Potential Reach estimate for the UK, at 800,000 users, was in stark contrast with the estimates reported in studies which relied on another proxy for users' migration background. Pötzschke and Braun (2017), who narrowed their selection criteria down to 'Expats (Poland)' who were 'away from hometown', reported Potential Reach figures for the UK of 410,000 users as of November 2016. Ersanilli and van der Gaag (2020), who used a similar strategy except for the 'away from hometown', reported 320,000 users as of May 2019 (E. Ersanilli, personal communication, 21 May 2021). Such drastic differences in the Potential Reach figures for the same target population in the same geographical context across the three studies confirm that Potential Reach estimates are sensitive to additional criteria, something that researchers should reflect better on when designing suitable recruitment strategies. Whereas it remains unclear to researchers why the 'Lived in – country' (former 'Expats') criterion reduces the Potential Reach to such a drastic extent, a viable answer may lie in the algorithms underlying the way(s) in which Facebook infers information about users' previous residence abroad. Contrary to this latter, there appears to be more clarity with regards to how Facebook infers language(s) understood by its users. Although its claims cannot be verified, a blog post from 2018 explains how Facebook learns about the languages which its users understand. Firstly, it registers both

the language of users' browser and the language of their Facebook interface. Secondly, it considers the languages declared by users in the personal information section, which may be manipulated by the users themselves. Finally and most importantly, Facebook infers the languages its users understand based on their interactions on and off Facebook, such as likes, comments and shares (Devoy 2018). Combined, these methods provide Facebook with much more information about its users' familiarity with different languages than that which the users themselves declare in their account.

To conclude, the Potential Reach figures based on the language criterion used in this study seem to correspond quite well with the size of the targeted population in Norway and the UK, where the overwhelming majority of the Polish migrants settled after the 2004 EU enlargement. In Sweden, which features a longer history of Polish immigration and where over 14 per cent of the targeted Polish-born population were 65 years or older, the Potential Reach was some 16 per cent smaller than the size of the targeted population. Zooming in on the UK context, the results suggest that the language-based targeting criteria provided this study with a much broader coverage of the target population, compared to studies which relied on the 'Lived in – Poland' (formerly 'Expats Poland') criterion. However, the language-based targeting of migrants may turn problematic with languages that are spoken beyond the borders of a single state, such as Arabic, English or Spanish (for a discussion of the use of Spanish in targeting Argentinian migrants in Europe, see Ersanilli and van der Gaag 2020). Furthermore, this strategy may not be feasible with a number of languages that are not yet made available in the Facebook Ads Manager, such as Somali, Tigrinya or Amharic.

#### *Demographics of the recruited samples vis-à-vis the official immigrant population*

To further appraise the adequacy of language-based targeting, it is of interest to analyse the socio-demographic composition of the recruited samples. In what follows, the Facebook-recruited sample ( $n=3,552$ ) is analysed according to respondents' gender, age, geographical distribution and length of residence in each of the studied countries.

At the time that this survey was conducted, in spring 2017, the male-to-female ratio among Polish immigrants aged 20 and above (i.e., the target population) was, respectively, 68 per cent versus 32 per cent in Norway (SSB 2021c), 45 per cent versus 55 per cent in Sweden (SCB 2021c) and 49 per cent versus 51 per cent in the UK (ONS 2017b). Despite the fact that the gender ratios of the Facebook ad's reach and the link clicks were mostly balanced (see Table 2), women were slightly overrepresented in the overall Facebook-recruited sample (55.5 per cent of all respondents) – 43.7 per cent of the sample in Norway, 59 per cent in Sweden and 57.9 per cent in the UK. It appears that, whereas male and female Facebook users on average did not differ much in their tendencies to click on the Facebook ad (see CTR in Table 2), the female migrants were more likely to take and complete the survey. To better reflect migrants' gender ratio in a given geographical context, it may be useful to design several ads and allocate proportional budgets separately for men and for women, like Pötzschke and Braun (2017) did in their study. In the case of a single advert targeting both genders, as was done in this study, a possible solution is to temporally restrict the advert's target audience so that the gender ratio in the recruited sample better reflects the gender ratio in the studied migrant population.

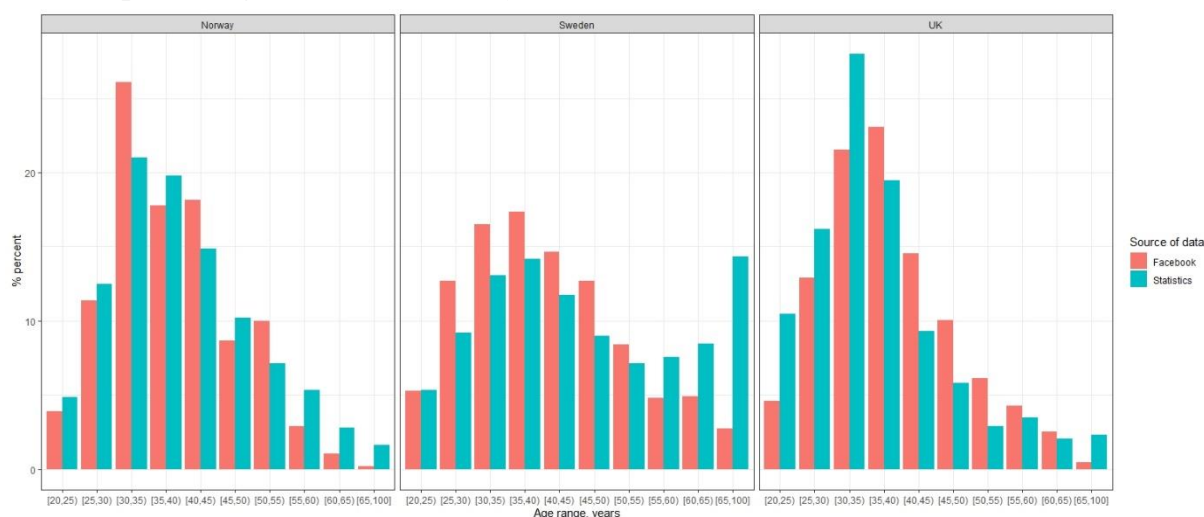
Concerning age, Polish migrants in Norway, Sweden and the UK tend to concentrate in working-age groups and are younger than the overall population in the countries of study (SCB 2021b; SSB 2021c; Hawkins and Moses 2016). As can be seen in Figure 4, the national samples follow very closely the age distribution of the Polish-born population in Norway and the UK. However, older cohorts, aged 55 and above, seem to be underrepresented in some contexts. The bias is especially pronounced in the Swedish

and, to some extent, Norwegian samples due to the larger proportion of older migrants in their Polish-born population, compared to the UK. Surprisingly, the opposite is true for the UK sample, where younger cohorts appear to be underrepresented. Despite these variations, it is evident that migrants aged 65 years and older are significantly underrepresented across all samples.

What deserves special attention is the tendency of older Facebook users to engage more actively with the Facebook ad, which holds true for both male and female respondents (see Table 2 in the Results). Such a tendency becomes even more pronounced the older the audience gets, reaching its maximum in the age group 55–64 years old before dropping again for users over 64 years of age. To a certain degree, this tendency could compensate for the fact that the older cohorts of migrants are less represented on Facebook. However, researchers must consider the potential of selection bias for this age group, as those who are found on social media may, in certain aspects such as digital skills, differ considerably from those who are not.

With regards to the geographical distribution of the Facebook sample, it follows very closely the actual distributions of the Polish migrant population in Norwegian (Figure 3a), Swedish (Figure 3b) and UK regions (Figure 3c). Thus, four Norwegian counties (Oslo, Akershus, Rogaland and Hordaland) which, as of January 2017, accounted for about half of all Polish-born persons in Norway, made up 53.5 per cent of the Facebook subsample. In Sweden, three-quarters of all Polish-born residents lived, as of early 2017, in the country's three most populous regions of Stockholm, Gothenburg and Malmö. These three regions made up 71 per cent of the Facebook subsample in Sweden. In the UK, respondents from all but two regions seemed to be proportionally represented in the Facebook subsample, with the North East being slightly over- and the South East somewhat underrepresented. Facebook's advantage in targeting users based on their devices' IP address assured a well-balanced geographical penetration of the recruitment advert, ensuring that even users in the most remote areas could participate in the study.

**Figure 4. Age distribution of the Facebook-recruited national samples versus the age distribution of Polish-born persons aged 20–65 in the study countries**



Sources: SSB (2021c), SCB (2021c) and Hawkins and Moses (2016).

Finally, given this study's goal to primarily recruit Polish migrants who settled in their immigration country after the EU enlargement in 2004, it is of interest to look at respondents' reported length of

residence (see Table 3 in the Results). Table 7 below compares Facebook respondents' reported length of residence versus that found in official sources.

**Table 7. Polish-born persons, according to the length of residence in Norway, Sweden, and the UK, 2017**

Length of residence	As reported in the Facebook subsample, <i>per cent</i>			Official statistics, <i>per cent</i>		
	Norway	Sweden	UK	Norway	Sweden	UK
<1 year	7.3	6.2	4.1	5.7	4.55	N/A
1–5 years	35.5	29.4	29.1	33.9	22.68	N/A
5–9 years	26.1	17.5	19.6	35.5	16.13	N/A
9–13 years	24.7	21.4	39.0	18.9	17.47	N/A
>13 years	6.4	25.5	8.2	6.0	39.16	<9.6
Total	100.0	100.0	100.0	100.0	100.0	100.0

Note: Norway's official data are for Polish-born persons of all ages (SSB 2021b). Sweden's official figure is for Polish-born people aged 20 years and above (SCB 2021a). The UK official figures are not available; the <9.6 per cent for those with over 13 years of residence is the author's own estimate based on total Polish migrant stocks in 2004 and 2017 (ONS 2017c).

As can be seen from Table 7, the pre-accession immigrants – that is to say, those with over 13 years of residence in the country of immigration – mostly concerned the Swedish sample. In Sweden, a relatively large Polish-born diaspora resided well before the 2004 EU enlargement. Between 2004 and 2017, its size merely doubled from 41,608 to 88,704 persons, whereas Norway and the UK saw a remarkable growth of 1,330 per cent and 1,110 per cent respectively (ONS 2017c; SSB 2021a; SCB 2021c). At the same time, the Polish migrant population in Sweden is also, on average, older – which is positively correlated with migrants' length of residence. The exclusion of the older cohorts of migrants, reflected in the deflated Potential Reach for Sweden (see above), can explain why only 25.5 per cent of the Swedish sample reported over 13 years of residence compared to 39.2 per cent for the official Polish-born population. Despite some differences in the proportions between certain time ranges, it seems that the Facebook ad reached well the earlier and later cohorts of Polish migrants in the three studied contexts.

## Conclusions and limitations

This study adds to the emerging body of literature which documents the use of online social networks for recruiting migrants to social research. In line with other studies which targeted migrants using Facebook Ads Manager, the strategy employed in this study proved to be both effective and cost-efficient. Online connectivity wherever and whenever users access their accounts gives Facebook a unique advantage in targeting potential survey respondents. Despite researchers' rising awareness of this potential, studies which have tapped into this opportunity often fail to assess their Potential Reach or to analyse how representative their recruited samples are. The goal of this article, therefore, was to look beyond the simple metric results and assess the accuracy of a targeting strategy which relied primarily on users' command of a language as an indicator of their migration background.

Contrary to studies which relied on users' previous residence abroad, known as the 'Lived – in' targeting criterion, this study used migrants' language (Polish) to target and recruit Polish migrants aged 20 years and older in Norway, Sweden and the UK. Given the criteria used in this study, Facebook estimated the Potential Reach for the advert to be 947,000 users: 80,000 in Norway, 67,000 in Sweden and



800,000 in the UK. By contrasting the Potential Reach figures with the official statistics on the Polish-born population in the three countries of study, this article has shown that targeting based primarily on users' language (Polish) provided a fairly good coverage across all studied contexts. Thus, the Potential Reach figures corresponded very neatly with the official Polish-born population in Norway and the UK, where most Polish migrants were quite recent arrivals (with less than 13 years of residence) and on average younger. In Sweden, however, where Polish migrants tend to be older and with longer residence abroad, the Potential Reach was 16 per cent lower than the size of country's Polish-born population. Further, the analysis of the Facebook-recruited sample has shown that oversampling was not an issue, given that very few respondents (0.7 per cent of the sample) were outside the target population. More importantly, this study's Potential Reach for the UK, estimated at 800,000 users, was clearly larger than the reported figure of 410,000 in Pötzschke and Braun (2017) and 320,000 users in Ersanilli and van der Gaag (2020), two similar studies which, instead, used the 'Lived in – country' (formerly known as 'Expats – country') criterion in targeting Polish migrants in the UK. In order to significantly increase the numbers of potentially eligible respondents included in Potential Reach, I argue, researchers should consider different targeting strategies, taking into account the demographics of the migrant groups whom they target and the specificity of the languages these migrants speak. This study has shown that targeting strategies based on Facebook users' language can be effective in cases where migrants' linguistic, ethnic and national boundaries coincide, as in the case of Polish migrants. However, this may turn out to be problematic for other languages – such as Spanish or Arabic – that transcend ethnic or national boundaries or for those languages that are not available in the Facebook Ads Manager. As was the case for other studies in this emerging field of research, the key limitation of this study was related to the algorithms used in Facebook Ads. As the mechanisms underlying the classification of users into certain categories remain sometimes opaque, migration scholars should be cautious when designing targeting strategies and compare their Potential Reach with the data from official sources.

The analysis of the socio-demographic composition of the collected samples has highlighted the importance of considering both the socio-demographic composition of the targeted migrant groups and the history of their migration in each studied context. Thanks to the Internet's penetration to even the most remote areas of Norway, Sweden and the UK, the regional distribution of the Facebook subsample in this study accurately followed the actual regional distribution of the Polish migrants in the three countries. Concerning gender balance, although male respondents recruited via the Facebook advert seemed to be less likely than women to participate, this could be mitigated by either temporally restricting the advert's target audience to male respondents only or by setting up advert sets and budgets separately for men and women. When it comes to the age of respondents, this study has shown that, in countries where access to the internet is almost universal, even presumably hard-to-reach social groups, such as older male migrants, may show a greater interest in participating in survey research than younger users. In this study, Facebook users aged 45–64 years old were between three and four times more likely to click on the ad than users below the age of 45. This should sound particularly promising to researchers aiming to use Facebook for recruiting older migrants to their research. However, older cohorts of migrants, especially those above 65 years of age, were underrepresented in the national subsamples. In analysis, quantitative data collected via online social networks must be weighted to better reflect the socio-demographic composition of the studied migrant population.

## Note

<sup>1</sup> Soon after, Facebook replaced the 'Expats (country)' criterion by the 'Lived in – country' category although the logic remained the same.

## Availability of data and materials

The original data analysed during the current study can be made available from the corresponding author on reasonable request.

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## Conflict of interest statement

No conflict of interest was reported by the author.

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— Special Series —

# The Migration Transition in Poland

Marek Okólski\* 

*In the period 1950–2020, international migration in Europe changed significantly. One of the most characteristic features was the change in net migration from negative to positive. At the beginning of the twenty-first century, Poland belonged to the minority of countries in this respect – that is, it experienced strong emigration but only minor immigration. However, migration in Poland has also been changing. In the second decade of this century, the outflow of people has weakened, the inflow of migrants has increased and the migration balance has become positive. I analyse these phenomena from the theoretical perspective of the migration transition that was experienced in the second half of the twentieth century by most countries in Western, Northern and Southern Europe. I attempt to answer the question of whether the latest migration phenomena prove that this transition is also occurring in Poland. In conclusion, I argue that the available to-date evidence provides an affirmative answer to this question.*

**Keywords:** *migrations, migration transition, Europe, Poland*

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### Poland as a country of sustained emigration – an enduring perception

Until recently, Poland was perceived as a country of emigrants. Such an image was quite common in Polish society. People had emigrants in their family circle or knew families from which someone had gone to work or settle abroad. The image of *émigré* Poland in mass culture – initially mainly in fiction writings – continues to this day: from the works of late-nineteenth and early-twentieth century luminaries of the *belles-lettres* – for example, Maria Konopnicka (1910), Henryk Sienkiewicz (1882) or Stefan Żeromski (1898, 1925) to the outstanding contemporary prose of Witold Gombrowicz (1953), Czesław Straszewicz (1952), Melchior Wańkowicz (1952) and Sławomir Mrożek (1974) as well as Zbigniew Herbert's poetry (1974), to the most recent work of Janusz Głowacki (1992), Edward Redliński (1994), Manuela Gretkowska (1991, 2001), Henryk Grynberg (2004) and others.<sup>1</sup>

In the current century, however, the leading role in portraying the emigration of Poles and the related problems seems to be the audiovisual means of expression. The set of well-known films whose plot is based on emigration is already quite substantial. After a few – still in communist times – attempts by filmmakers to deal with the topic in the 1960s and 1970s (a comedy by Bareja 1963; a touching drama by Petelski and Petelska 1978) followed by a drama film by Skolimowski (1982) and a clear revival of interest in 1989–2009 (see Bromski 2009; Lang 1992; Zaorski 1997), the five years (2015–2019) preceding the current pandemic's disruptions produced a rash of emigration films (Antoniak 2018; Banaszkiewicz and Dymek 2018; Domalewski 2017, 2020; Gajewski 2015). Numerous TV productions, especially the 29-episode series *Londoners* which was broadcast in 2008 and 2009, also strongly appealed to the imaginations of Poles. It is worth adding that the mass culture message gained significant support from news services and mass media journalism.

Evidence of the scale and duration of emigration from Poland can be found in many countries. The 'Polish' parishes and even villages in Parana and Texas, as well as the workers' settlements in American, German or French cities in the late-nineteenth and early-twentieth centuries, were by no means isolated instances (see, for example, Baker 1982; Bukowczyk 1986; Janowska 1965; Klessman 1978; Kula 1981; O'Brien 1992). The perception of Poland as a country of emigration was fostered by the relative durability and cultural coherence of Polish communities abroad and, in some cases, even by the political activity of Polish organisations (Pilch 1984). On the other hand, in many European countries, the past half century has seen a well-documented influx of Poles, sometimes as the dominant immigrant group – an influx accentuated in often-heated media debates. In various countries, under the influence of the presence of immigrants from Poland, stereotypes of Poles have developed over the course of the last few decades.

Migration researchers have found substantial empirical evidence confirming the *en masse* scale of emigration and the high propensity to migrate in Polish society in comparison to many other nations.<sup>2</sup> Thus, the perception of Poland as a country of emigrants is justified.

### Migration in Poland compared to other European nations – the long view

I would also like to look at the phenomenon of mass emigration from Poland from a different angle. Migration affected almost all European countries. Jean-Claude Chesnais (1986), like many other authors (e.g., Coleman 2006; King 1996; Van de Kaa 1999), writes of its regulatory role in demographic development. In the initial phase of the demographic transition, the population growth was so rapid<sup>3</sup> that it led to sometimes tremendous overpopulation, with a consequent increasing pauperisation and shortage of livelihoods for large sections of society. Emigration turned out to be one – and perhaps the easiest

– means of solving the problem. The peak of the European outflow of people occurred in the last decades of the nineteenth century and at the beginning of the next. Between the years 1846 and 1932, millions of inhabitants emigrated from a number of European countries: the most, 18 million, left the British Isles (including Ireland); 11 million left Italy; and about 5 million each left the Austro-Hungarian empire, Germany and Spain. Emigration from the British Isles (including Ireland) encompassed 66 per cent of the population at the beginning of this period, 63 per cent in Norway, 48 per cent in Portugal and Italy, 36 per cent in Sweden and 31 per cent in Spain (Chesnais 1986: 165). In many of these countries – Ireland, Norway, Portugal, Great Britain and Italy – the strong outflow of people lasted for at least five decades (cf. Woodruff 1966) (my criterion here is a minimum emigration rate of 3 per 1,000 population). Intensive emigration occurred even in countries that were never considered as ‘emigrant’ countries – for example, in France, from where in the years 1851–1900 more than 800,000 emigrated (Lucassen and Lucassen 2010: 14). Note that, in a similar period (1871–1913),<sup>4</sup> the outflow of people from Polish lands,<sup>5</sup> although significant, did not match the emigration from most of the countries mentioned here. Emigration affected about 3.5 million people or 17–18% of the initial population (Gawryszewski 2005: 409).

Weaker emigration from Polish lands during the period of mass European exodus had the same causes as that from other countries of Eastern Europe. As argued by Chesnais (1986), there was a relative delay in relation to other parts of the continent in the emergence of a permanent surplus of births over deaths due to the systematic decline in mortality. Any substantial outflow of people appeared in this part of Europe only in the 1880s and the peak period of emigration did not begin in these countries for another 20 years – i.e., in the first decade of the next century. Shortly thereafter, however, the increase in population coincided with international political and economic turbulence, which significantly limited the possibilities of emigration.<sup>6</sup> Proof of the importance and considerable consequences of these difficulties is, *inter alia*, the situation of Poland in the interwar period, when there was, and intensified at that, a huge – multi-million – overpopulation of the countryside (hidden unemployment), which could not be permanently exported abroad (Kalinowski and Wyduba 2021; Turowski 1937).

After the end of the Second World War (and even in the interwar period), emigration significantly decreased in many European countries or even ceased to be a mass phenomenon although a growing immigration appeared. Gradually, between 1950 and 1990, most of the non-communist European countries transformed from (net) emigration areas to (net) immigrant areas and the continent as a whole became one of the world’s most attractive magnets for migrants (Castles and Miller 1993; Collinson 1994; Gatrell 2019; King and Okólski 2019).

However, until the beginning of the twenty-first century, this tendency did not apply to Central and Eastern Europe. Both the outflow and the influx of people from abroad were subject to strict controls and restrictions of a political nature (e.g. Stola 2010). With the passage of time, as the demographic potential grew (and it grew rapidly, especially in the years 1946–1955) and economic difficulties accumulated, a ‘migration overhang’ was created,<sup>7</sup> that is, a quantity of relatively redundant people who were ready to emigrate but were deprived of the possibility (Iglicka 2020). Layard, Blanchard, Dornbusch and Krugman (1992), in their book devoted to this phenomenon, predicted on the threshold of the political and economic transition that effective implementation of the changes would require a strong outflow of people abroad:<sup>8</sup> a stream of the kind called ‘crowding-out migration’ (Okólski 2012a).

Indeed, from the 1990s onwards, along with the gradual liberalisation of the rules of human movement, increased emigration on an economic basis could be observed in these countries (Fassmann and Münz 1994, 2000). This outflow of people was substantially reinforced by widespread unemployment



which resulted from market-oriented economic reforms introduced in the early 1990s.<sup>9</sup> In member states of the European Union the peak coincided with the period after their accession (Black, Engbersen, Okólski and Panțîru 2010). This mass emigration was an unusual phenomenon on a European scale because, first, it occurred at a time when the rest of Europe was attracting rather than sending out migrants and, second, it coincided with a drastic collapse in demographic growth.<sup>10</sup> It would seem, in fact, that this outflow of people abroad was a delayed complement to the mass emigration that was not realised in the interwar period and later, and was associated with the accumulation of large population resources (Grabowska-Lusińska and Okólski 2009).

However, the case of Poland and several other countries proves that recently, at least since the second decade of this century, emigration from this part of the continent has been diminishing, while immigration has increased, leading to a reversal of the balance of migration flows (cf., for example, Fihel and Okólski 2020; Grabowska-Lusinska, Drbohlav and Hars 2011).

The migration phenomena in Central and Eastern Europe might seem similar to the transformation observed in the second half of the last century in Western Europe (and, with some delay, in Southern Europe) – i.e., the change from being countries with ‘redundant’ populations ready to emigrate to becoming magnets attracting people from other countries or regions (Okólski 2012b).

### The concept of the European migration transition

The changes in migration trends in Europe that have been observed since the nineteenth century were described in a stylised manner by means of the theoretical concept known as the ‘migration transition’. Although the concept, which is akin to the *longue durée* approach, facilitates the arrangement of the complex, erratic and often disorderly events of and trends in international mobility, it should not be considered as their deterministic projection. Unfortunately, the name of this theory has been assigned to contents of varying scope (and sometimes even meaning), which is not conducive to unambiguous use.<sup>11</sup>

Nevertheless, every understanding of the term ‘migration transition’, among its various characteristics and manifestations, contains the view that the trend characterised by the predominance of emigration over immigration has reverted to the opposite trend. The originator of this concept is Wilbur Zelinsky (1971) who, in describing the relationship between population changes – known as the demographic transition<sup>12</sup> – and the simultaneous changes in migration, formulated the theory of a (territorial) mobility transition, one element of which is the reversal of the foreign migration balance from negative to positive.

However, I consider that it was Chesnais who introduced the idea of the migration transition as a specific European phenomenon related to the European model of modernisation and the demographic transition characteristic of this continent, despite the fact that he formulated his idea 15 years after Zelinsky.<sup>13</sup> With a certain stylisation of this concept (cf. Fihel and Okólski 2018 for a more detailed description), it could be argued that, in contemporary Europe, there has been a certain long-lasting population cycle consisting of three stages: (1) long-term stabilisation or stagnation of the population (despite sometimes drastic short-term disturbances), (2) a systematic population increase over a period of two or three generations and (3) long-term stabilisation (or stagnation) of the state of the population (at this stage without significant fluctuations in shorter periods), although at a much higher level than in the first stage. The second stage of the cycle is nothing more than a demographic transition. Somewhat parallel to this cycle is the secular migration cycle, the first and third (last) stages of which are characterised by a relatively low intensity of international migration. In the second (intermediate) stage, however,

there is a significant revival of international movement during which the phenomenon known as the migration transition appears.<sup>14</sup>

Both the demographic transition and the migration transition involve two significantly different phases. During the first, a rising intensity of natural increase (the explosion phase) then gives way to a weakening intensity of the increase (the implosion phase). On the other hand, in the migration transition, the recovery of migration flows in the first phase involves increased emigration and, in the second, increased immigration, which leads to a change in the migration balance from negative to positive (Okólski 2012c). The phases of the transition are strongly influenced by the respective phases of the demographic transition (at least are correlated with them) – the population explosion results in increased emigration and the implosion ultimately creates conditions for increased immigration.

In developing the concept of a migration transition, Joaquín Arango (2012) suggested the existence of two basic causes for the varying characteristics of the same transition in different European populations – both related to the passage of time. Drawing from the demographic analysis, he called them the cohort (generation) effect and the age (aging) effect.<sup>15</sup> The age effect is expressed in specific migration characteristics, such as intensity and selectivity, corresponding to the stage of the migration cycle (including the migration transition stage). As different European countries are at varying stages or phases at any given time, the characteristics of their migration inevitably differ, an example of which is the sequence of sub-phases occurring in the second phase of the migration transition, as identified by Felice Dassetto (1990). It should be remembered that the basic tendency of this phase is increased immigration and the permanent predominance of this stream over emigration.

According to Dassetto, the phenomenon occurs sequentially in the form of three different sub-phases. The first is the inflow of workers from less-developed countries who are predominantly socially marginalised in a destination country; in the second, the main stream consists of family members of these employees. This second sub-phase is accompanied by the settlement and acculturation of the foreigners and social tensions related to their increasing use of social benefits and public services (schools, medical institutions, etc.) and appearance in the 'neighbourhood'. In the third sub-phase, a long-term process of inclusion and integration of settled immigrants occurs. The cohort effect, on the other hand, is based on the emergence of a given migration phenomenon corresponding to the specific phase of transition at different historical (calendar) times.

### **Why are there the differences in migration transition in various parts of Europe?**

The cohort effect is of particular importance for explaining the differences between European countries in contemporary migration, especially with regards to the characteristics of immigration – a specific feature of the second phase of the transition. According to Arango (2012: 50),

*[i]t stems from the influence exerted on the course and characteristics of the immigration experience by the historical context in which its initial and formative phases took place. Especially influential elements of this context are the types of immigration flows prevailing in that period and the socio-economic conditions that determine them, the dominant conceptions of migration and the main characteristics of the international economic order and of socio-economic regimes. These influences may leave a long-lasting imprint on later stages of the immigration experience. These formative years may shape dominant social orientations towards immigration that would have a long-lasting effect or produce facts or policies that further impact future developments.*

The immigration experiences of European countries confirm that there were differences in circumstances, as mentioned here, in the initial period of the second phase of the migration transition, as well as subsequent differences in the course and characteristics of immigration. This differentiation is the subject of my previous analyses (King and Okólski 2019; Okólski 2012c; Okólski 2017), which prove that the concept of age and cohort effects may be very useful in interpreting and explaining the differences between European countries in the final (second) phase of the migration transition. At this point, rather than quoting all the arguments used in these analyses, I limit myself to the basic conclusions.

First, shortly after the end of the Second World War, there were clear differences in the course and characteristics of migration between three areas (mega-regions) of Europe: its north-west, southern and eastern parts (including the central-eastern region).<sup>16</sup> This third area, unlike the other two, consisted exclusively of communist countries. The differences clearly reflected the phase of the migration transition accomplished by these mega-regions and their advancement in its course. They survived until the beginning of the twenty-first century and are, to some extent, still visible today.

Second, the course and characteristics of migration in the entire post-war period, lasting over 75 years, have changed in each of the main areas of Europe. These changes have had a specific form in each of the areas, although they occurred at the same time and apparently, to a great extent, under the influence of similar geopolitical and economic conditions.

In the final (second) phase of the migration transition, European countries became (or are becoming) areas of immigration – that is, the outflow of people abroad has diminished (or is weakening) and the inflow increased (or is increasing) – which has ultimately led to a permanent change in the migration balance from negative to positive. The first mega-region where this phenomenon occurred was the Western and Northern countries. A surplus of immigration over emigration appeared in most of them in the 1960s and 1970s (earlier in France and relatively late in the UK). Other countries that experienced this phenomenon at the end of the century belonged to the south of the continent. In the same period, the ‘laggards’ of the north and the west – Finland and Ireland – joined the group of net immigration countries. The third mega-region, consisting of the countries of Central and Eastern Europe, is just showing the beginnings of the process which, in other areas of the continent, caused a change in the migration balance. In several Central and Eastern European countries (the Czech Republic, Slovenia and Hungary) this change has already become quite clear. Thus, we can assume that, when becoming a net immigration area, the first of the three mega-regions belongs to the 1960s cohort, the second to the 1990s cohort and the third to the cohort of the second decade (or perhaps later) of this century.

Migration in each of these three cohorts took place in significantly different geopolitical and economic conditions. Viewed from the political perspective, the Cold War continued to reverberate until at least the end of the 1960s and the enemy camps of the West (including the South) and East were consolidated. The countries of the West opened their borders to migrants and actively engaged in their recruitment. In addition, a few of these countries experienced massive inflows of people from their former colonies. From the mid-1970s, the process of *détente* and the inclusion of the Southern countries in international political and economic structures began. During this period, the recruitment of migrants was replaced by Western countries’ attempts to regulate their influx. At the beginning of the 1990s, the former hostility and isolation of the East (the Central and Eastern European countries) gave way to far-reaching pan-European cooperation. In the course of this process, most countries have gradually adopted basic liberal-democratic principles from the West, while also implementing similar regulations regarding the movement of people across national borders.

In regard to the economic context, in the first period the migrations characteristic of it (and also of the first of the cohorts of the countries considered here) were referred to as being of the ‘Fordist’ type.

These migrations were related to mass (serial) industrial production and the intense demand for jobs that did not require high qualifications. The great economic boom in the West was not without significance in this period. It was fueled, *inter alia*, by investments financed under the Marshall Plan. A significant labour deficit arose, which was satisfied by the mass import of foreigners. From the mid-1970s on – given the raw-materials crisis and the challenges of globalisation – the capitalist economies of Europe experienced transformations whose most significant manifestations were deregulation, the expansion of transnational corporations, the flexibility of industrial production and services, a more than previously diversified international division of labour and the volatility of consumer demand. As a consequence, the demand for labour and the forms of employment underwent a profound qualitative (and also quantitative) change and the following became popular: mandate contracts, part-time work, outsourcing and remote work. Russell King called the related labour migrations ‘post-Fordist’ and characterised them as follows (2002: 95):

*Migration has become a new global business with a constantly shifting set of agents, mechanisms, routes, prices and niches. Very different from the Fordist labour migration system of Europe in the 1960s and early 1970s, the new migration regimes of the 1980s and 1990s were based on fast-evolving European and global conditions: the escalation of push pressures from the global South, the new-found economic prosperity of Southern Europe (combined with ease of entry), and the removal of the Iron Curtain as a barrier to emigration (...).*

In the third period, that is, at the beginning of the twenty-first century, one of the most significant factors in the European economy was the major expansion of economic potential and markets thanks to the accession of Central and Eastern European countries to the European Union. Economic changes were also marked by increasing digitisation and computerisation. Flexible and unstable forms of employment have become much more frequent and the conditions for an increased mobility of the labour force have emerged. The countries of Central and Eastern Europe have experienced dynamic development and short-term, often circular, labour migration, especially between nearby countries, has flourished.

Thus, the countries of the West and the North represented the pioneering cohort of complete migration transition, while that of Central Eastern countries was delayed in this process by several decades. At any point at which migration phenomena in Europe are viewed, the picture is different in each of the three mega-regions of the continent due to the ‘cohort effect’ – that is, the political and economic context in which the analysed migration changes (the second phase of transition) were initiated. This, in turn, was strongly influenced by the ‘age effect’. At every point of the second phase of the migration transition in Europe the differences between individual countries resulted from the degree of their advancement – the sub-phase in which a given country found itself. The same applied to the preceding phase. Nevertheless, regardless of the differences indicated here, the experience of a migration transition has undeniably been shared by all (or almost all) European societies.

### **Towards the final phase of migration transition in Poland**

Poland, as a country belonging to the ‘cohort’ of Central and Eastern European countries, is among those lagging the furthest behind in the migration transition and, therefore, behind the Mediterranean countries and even further behind the transition leaders in the Western and Northern European countries in regard to becoming an immigration area (Bonifazi 2008; Okólski 2013). Nevertheless, the question arises as to whether or not Poland has already entered the phase of intensified immigration and the

growing predominance of this flow over emigration. The rest of this paper is devoted to attempting to answer this question.

Before moving to the heart of the matter, I feel obliged to mention a study I co-authored, which was tellingly named 'The Unfinished Migration Transition' (Anacka, Fihel and Okólski 2018). The paper, in which the migration reflected in the statistical data and special studies described therein which occurred in the period up to 2015, was written relatively recently but, despite the short passage of time, enough changes have already taken place in Poland to require the modification or supplementation of the regularities we expressed there. Viewed from the perspective of the past few decades (including the period in which the transition from state socialism to liberal democracy began and culminating in Poland's accession to the European Union), foreign migration before this period was strongly marked by breakthrough political events. These included, first (in 1948), drastic administrative restrictions in regard not only to migration but to all international mobility, later (in 1989), the wide opening of the border (although in practice the opening was limited to non-migrant mobility) and, finally (starting from 2004), the guarantee of full freedom to migrate.<sup>17, 18</sup>

This sequence of radical changes in Poland's migration policy left a strong mark on the processes of foreign mobility, which were dominated first by the accumulation of a huge 'migration overhang' and finally by a mass outflow of people abroad – and this in a situation of zero population growth and a continuing decline in the numbers of people capable of working. This gave rise to doubts as to the correctness or legitimacy of interpreting migration in the Polish context in terms of the migration transition, at least as experienced by most European countries. In the analysis cited here, we saw the possibility that the strong outflow of people would cease and that there would be, instead, a prevalence of quasi-migratory forms of inflow from abroad (such as foreigners coming to work on a tourist visa and multiple circulation) which could, in some part, turn into immigration in the strict sense, though such a prospect did not seem certain.

The research project which resulted in the paper cited above<sup>19</sup> also allowed for a different viewpoint and included a forecast of migration in Poland in 2010–2060 (Anacka and Janicka 2018). It adopted an innovative methodology (Anacka 2018). First, the migration to be analysed was divided into four flows: the emigration of Poles, the immigration of foreigners, the return migration of Poles and the outflow of foreigners. The definition of all four flows was based on the concept of the 'resident population'. Thus, the criterion of migration was the length of actual residence in or absence from Poland for more than a year, relative to the respective stream. This was in stark contrast with almost all previous migration projections which used the migration balance as the sole indicator. Second, unlike in the vast majority of migration forecasts, future migration trends were not 'delineated' on the basis of arbitrary assumptions (e.g., by extrapolating the trend or assuming that migration would be constant at the level observed at the time of preparing the forecast) but were based on the analysis of the results of an econometric model capturing the long-term relationship between identified migration flows and selected demographic and economic variables considered to be significant.

The parameters of the model were estimated on the basis of data from 31 European countries. An important feature of the forecast was also the *de facto* recognition that the logic and nature of the migration transition was conceivable and possible in Poland – that is, the fact that the direction of the migration trend may or even should change. An important argument in favour of this belief (contention?) was the depletion of the emigration potential of the Polish population, along with shrinking domestic labour resources.<sup>20</sup>

Indeed, the forecast analyses confirmed that, starting from the period 2015–2019, there would be dynamic changes in trends, especially with regard to the emigration of Poles and the immigration of

foreigners.<sup>21</sup> This decreasing rate of emigration and the growing rate of immigration were ultimately to cause the balance to change from negative to positive. The main element of this transformation is the rapid influx of foreigners and the growing role of this stream in shaping migration trends in Poland. The emergence of a permanent positive migration balance was predicted in the 5-year period 2025–2029 and the positive net migration rate is expected to peak in the period 2040–2044. The forecast clearly indicated the emergence of the second phase of the migration transition and the relatively close prospect of it being completed in Poland. Obviously, the team preparing the forecast had no basis for predicting unexpected events such as the Covid-19 pandemic, which could undermine the validity of these assumptions and thus the accuracy of the forecast results.

In this connection, what did migration trends in Poland look like in reality? I will not cite here the commonly known findings concerning the intense outflow of people in the years after 1 May 2004 which, in view of the weak immigration at that time, proved that Poland was still experiencing the first phase of the migration transition (see, for example, Grabowska-Lusińska 2008; Grabowska-Lusińska and Okólski 2009; Iglicka 2020; Iglicka and Ziolk-Skrzypaczak 2010; Kaczmarczyk 2010, 2018; Okólski and Salt 2014; White, Grabowska, Kaczmarczyk and Slany 2018). However, I propose to examine migratory conditions starting from 2010. To begin with, it should be made it clear that analyses which would be devoted to migration trends in Poland in the second decade of this century are missing in the scientific literature (rare exceptions include annual reports of the Government Population Council on the demographic situation of Poland and scarce fragmentary papers). For this reason my insight into those trends will be mainly based on crude data derived from public statistics.

**Table 1. Immigration to and emigration from Poland, as reflected in data from the Central Statistical Office in the years 2010–2019/20\***

Year	Migration reflected in 'permanent residence' registers			Registered long-term (over 12 months) migration			Estimated long-term (over 12 months) migration		
	immi- gration	emi- gration	balance	immi- gration	emi- gration	balance	immi- gration	emi- gration	balance
2010	15.2	17.4	-2.1	54.5	41.2	13.3	155.1	218.1	-63.0
2011	15.5	19.9	-4.3	45.7	44.3	1.4	157.1	265.8	-108.7
2012	14.6	21.2	-6.6	49.2	49.7	-0.5	217.5	275.6	-58.1
2013	12.2	32.1	-19.9	43.3	66.3	-22.9	220.3	276.4	-46.1
2014	12.3	28.1	-15.8	46.1	55.0	-8.9	222.3	268.3	-46.0
2015	**	**	**	**	**	**	218.1	258.8	-40.7
2016	13.5	12.0	1.5	61.7	47.1	14.6	208.3	236.4	-28.1
2017	13.3	11.9	1.4	37.3	37.8	-0.5	209.3	218.5	-9.2
2018	15.5	11.8	3.6	68.5	39.6	28.9	214.1	189.8	24.3
2019	16.9	10.7	6.2	73.1	39.1	34.0	***	***	***
2020	13.3	8.8	4.5	***	***	***	***	***	***

Notes: \* An explanation of the categories in this table are to be found, among other places, in *Rocznik Demograficzny* (CSO 2021b: 402–405); in particular, data on estimated long-term (over 12 months) migrations are being compiled by the Central Statistical Office according to the Regulation of the European Commission 862/2007 and take into account non-registered facts of migration. \*\* Lack of data due to impaired registration. \*\*\* Data still not available (as of 27 December 2021).

Source: *Rocznik Demograficzny*, various years. Central Statistical Office, Warsaw.

First, I suggest looking at the data which concern outflows, inflows and the balance of migration. Referring to the data in Table 1, the following observations seem justified:

1. In the year closing the period for which data were available at the time of writing this text, that is, in 2019, a positive migration balance was recorded. This is evidenced by all three quite different methods of measuring migration used by the Central Statistical Office (for an explanation, see the notes beneath the table. For the third measure – the ‘estimated long-term migration’, I refer to data from 2018 – the only ones available to date).
2. In the first half of the period analysed, the balance in the case of the first measurement (the least-adequately reflecting actual migration) was negative, with a slight tendency to deepen; this later changed to positive. In this case, the main component of the changes was undoubtedly the fluctuation in the volume of emigration, which initially clearly increased but which, in the last 4 years, has decreased dramatically. Initially, this was accompanied by a slight decrease in the size of immigration and then a similarly slight increase (see CSO 2021a).<sup>22</sup>
3. The second measurement, based on records of more than one year of absence (in the case of emigration) or longer than a year of residence in Poland (in the case of immigration), indicates the volatility of the balance (with its rather small size) and the relatively high positive level of this indicator in the last two years. In the case of the measurement, a greater role between the two components was played by the size of the immigration which (although not without fluctuations) clearly increased, while the volume of emigration (first increasing, then decreasing) ultimately remained close to the level in the initial year.
4. In my opinion, the approximate estimates which are compatible with Eurostat recommendations (the third measurement) reflect the reality the most adequately and therefore seem particularly interesting. The result of the measurement used here was that the sizes of both flows were several times greater than in the case of other methods. Immigration increased sharply in 2012 and, in subsequent years, remained at a similar relatively high level, while emigration from 2016 showed a clear downward trend. In this case, the migration balance turned out to be consistently negative until 2017. However, starting from 2012, it was systematically reduced, to become finally positive in 2018.
5. In general, in the period analysed, migration in Poland lost the features characteristic of the first phase of the migration transition while, in the final years (2018 and 2019), a clear symptom of the second phase appeared – a positive migration balance. Moreover, as appears from the estimations (prepared by the CSO for unified Eurostat statistics), the immigration became sizeable during this period which, in itself, is another important feature of the second phase of the transition.

Specific analysis of immigration to Poland should – in my opinion – help to answer the question of whether emerging manifestations of the second phase of the migration transition can be considered as a phenomenon which is firmly grounded in Polish conditions and heralds the completion of the transition in the foreseeable future. Before I refer to the respective statistics, I should mention that, for around two decades before 2010, Poland had become familiar with increasing inflows of foreign citizens. These, however, were mainly temporary movements. According to researchers studying this phenomenon, it might have foreshadowed a substantial rise in the long-term migration of foreigners (Górny, Grabowska-Lusińska, Lesińska and Okólski 2010).

**Table 2. Data of selected registers concerning foreigners staying or working in Poland in the years 2010-2019 (in thousands)\***

Year	First residence permit	Work permit	Employer declaration	Student enrollment	Valid residence document
2010	101.6	37.1	180.1	21.5	97.1
2011	108.0	40.8	259.8	24.2	100.3
2012	146.6	39.1	243.7	29.2	112.0
2013	273.9	39.1	235.6	36.0	121.2
2014	355.5	43.7	387.4	46.1	175.1
2015	541.6	65.8	782.2	57.1	211.9
2016	585.9	139.1	1314.1	65.8	266.2
2017	688.9	235.6	1824.5	72.7	325.2
2018	648.2	328.8**	1582.2	78.3	372.2
2019	724.4	444.8**	1640.1	82.2	422.8

Notes: \* An explanation of the categories in this table are to be found, among other places, in *Rocznik Demograficzny* (CSO 2021b: 402–405). \*\* In addition, permits for seasonal work (a category that did not exist before 2018): 2018 = 134,600, 2019 = 131,400.

Source: *Rocznik Demograficzny*, various years. Central Statistical Office, Warsaw and (in the case of the first category) *Residence Permits: Statistics on First Permits Issued During the Year*, 'Statistics Explained', Eurostat; cf. [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Residence\\_permits\\_-\\_statistics\\_on\\_first\\_permits\\_issued\\_during\\_the\\_year&oldid=507019](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Residence_permits_-_statistics_on_first_permits_issued_during_the_year&oldid=507019) (accessed: 17 May 2021).

To address the question posed above, I use the data in Table 2. When interpreting these data, two preliminary remarks should be made. First, they comprise only foreigners who came to Poland, unlike the data in Table 1, where the statistics of immigrants included both Polish and foreign citizens. Second, the data come from various administrative registers (e.g. from the Ministry of Family and Social Policy, the Ministry of Education and Science, the Office for Foreigners, etc.) which serve a purpose other than measuring immigration. In addition, the collections of foreigners included on these registers are not completely separate and also do not cover so-called undocumented migrants. Nevertheless, I believe that the data represent a broad and complementary spectrum of citizens of other countries coming to and living in Poland which, when analysed together, may provide an answer to the above-mentioned question.

An obvious and coherent conclusion can be drawn in the case of each of the registers: at the end of the 10-year period under consideration, the corresponding number was many times higher than at the beginning. Thus:

- the number of first residence permits was over 7 times higher;
- the number of work permits was almost 12 times higher;
- the number of employers' declarations on employing a foreigner was almost 9 times greater;<sup>23</sup>
- the number of foreign students was nearly 4 times higher (in 2019, they accounted for 6.8 per cent of the total number of students in Poland); and
- the number of people with a valid residence document was more than 4 times higher.

Thus, undoubtedly, in the period 2010–2019, Poland experienced an unprecedented increase in the migration of foreigners. Further observations are as follows:

1. The increase in the inflow of foreigners continued throughout the entire 10 years.
2. A particular increase in this inflow occurred just after 2013 although, in the case of the register of first residence permits and students, the acceleration occurred a year earlier.



3. The numbers of foreigners arriving or living in Poland at the end of the decade had become significant not only in comparison with many other European countries but also in relation to the population of Poland.

It is worth supplementing these statistics with four additional observations. First, in 2016–2019, Poland was the top EU country in terms of the number of (first) residence permits issued to third-country nationals, naturally outstripping all major European net-immigration countries.<sup>24</sup> Second, according to the estimates of the Central Statistical Office, at the end of 2019, 2 million and 106,000 foreign citizens lived in Poland which translated to 5.5 per cent of its total population.<sup>25</sup> This created a sharp contrast to the situation in the 1980s and 1990s, when the percentage of foreigners was estimated at a fraction of a per cent, even in comparison to the 2011 census data, which showed that the corresponding percentage was less than 0.8. Third, in the final years of the period under analysis, the Polish labour market contained between 2 and 3 million foreigners each year and, in June 2020, 818,800 foreigners were already registered for retirement and disability insurance with ZUS (the Social Insurance Institution) – around 5 per cent of all persons covered by insurance.<sup>26</sup> In the decade 2010–2019 the number of insured foreign citizens rose at a striking pace; it was only 78,600 at the beginning of this period (and 440,200 in 2017), more than 10 times less than in 2020.<sup>27</sup> This indicates that a growing number of migrant workers might have had relatively safe and stable employment in Poland. Finally, the characteristics of the influx of foreigners in 2010–2019 still differed from those observed in European countries more advanced in the second phase of the migration transition, for the immigrants in Poland not only consisted mainly of people looking for a job but also of people living alone there (without family members). To be true, most of the immigrants stayed in Poland for a relatively short time – less than 12 months – although there was a clear tendency to extend their stay and for their families to also go to the country (for a more detailed analysis of these phenomena, see Kołodziejczyk, Okólski and Stefańska 2018; Okólski and Wach 2020).

## Conclusion

My answer to the key question of whether the phenomena that are characteristic of the second phase of the migration transition and that have been observed in the 2010s in Poland are sufficient to prove their comprehensiveness and consolidation and allow us to conclude that they will be long-lasting is confirmative. Poland has already entered this phase, although it is only at its beginning (the first sub-phase). The persistence of these phenomena will probably be dynamic and consistent with the qualitative changes in immigration described in Dassetto's above-mentioned concept. The enormous increase in the influx of foreigners for temporary employment will transform into massive family migrations and the consequence will be intense adaptation processes, not devoid of social tensions. This is how the migration transition in Poland could relatively soon be completed.

However, it should not be expected that there will be a duplication in Poland of the migration patterns observed in countries where the migration transition took place earlier, nor large similarities in the course of migration processes. The aforementioned age effect will make Poland appear as a relatively 'less mature' immigration country for many years to come. The consequences of the impact of the cohort effect will become particularly deep, causing specific, difficult-to-predict immigration phenomena during the second phase of the transition, one of which is quite obvious today. In the case of Poland, the main reservoirs of immigrants are (and will remain) completely different countries to those of the north, west, and south of the European continent. Another specific phenomenon may be the relatively permanent popularity of circular migrations related, for example, to the increasing ease of movement

and communication in the international space. This may result in a relatively low propensity of migrants to be settled.

Finally, immigrants' different patterns of adaptation, which will be embedded more in transnational spaces than was the case in the 'pioneering countries', cannot be ruled out. It is also difficult to predict what the impact will be on the course of the second phase of the transition of the level and nature of the return migration of Poles who, in the period of the 'last emigration',<sup>28</sup> often encountered relatively favourable conditions for adapting to life outside their home country.

It goes without saying, in addition, that the present Covid-19 pandemic will certainly lay its imprint, still difficult to predict and evaluate, on the migration pattern of all countries, including Poland.

## Notes

<sup>1</sup> Novels treating the experience of emigration appeared in such numbers following Poland's entry into the European Union that it is difficult to come up with a representative list. For example, in the years 2005–2009, among other titles, see: Bielawska, 2009, Krenz, 2008, Ledzewicz, 2009, Lustyk, 2008, Parys-White, 2008, Plebanek, 2007 and Tubylewicz, 2005.

<sup>2</sup> It suffices to mention here the effects of the most recent, post-accession (after 1 May 2004), wave of outflows. For example, on 1 January 2010, the EU countries alone registered around 1.5 million Polish citizens residing on their territory, which positioned Poland among the top 4 immigrant countries, just behind Turkey, Romania and Morocco (European Commission 2011). Between 2004 and 2010, in countries such as Iceland, Ireland, the Netherlands, Norway and the United Kingdom, Poles changed their position from a minor to a leading immigrant nation. According to the estimate by Poland's Central Statistical Office (CSO 2021a), in 2004–2010 the number of Polish emigrants increased by around 1 million (and by 2015 by another half a million). For a comprehensive analysis of post-accession emigration from Poland, see Grabowska-Lusińska and Okólski (2009).

<sup>3</sup> According to Walter F. Willcox (quoted by Chesnais 1986: 299), between 1800 and 1935 the population whose mother tongue was Russian increased 6 times, 5 times for English speakers, 3.5 times for Polish and Italian speakers, 3 for Spanish speakers, 2.5 times for German speakers and 2 times for French speakers.

<sup>4</sup> As times which are 'similar to' 1846–1932, we consider the period of the last three decades of the nineteenth century and the years preceding the outbreak of the First World War, that is, 1871–1913. Before that, emigration from Polish lands was negligible while, later, during the war, it principally reflected compulsory displacements or their consequences.

<sup>5</sup> The most popular estimates for this phenomenon concern the territory of Poland within its 1938 borders.

<sup>6</sup> In the case of Poland, important factors – reducing the outflow of population during the period 1914–1945, when ongoing mass (voluntary) emigration could be expected – included war operations in 1914–1918/20 and 1939–1945, immigration restrictions in some target countries (mainly the USA), and a drastic shrinkage of labour markets (greatly decreased demand for labour) in these countries during the economic crisis of 1929–1934.

<sup>7</sup> Note that these countries differed considerably with respect to such a migration overhang. In fact, in some of them (notably ex-GDR and ex-Czechoslovakia), a scarcity of labour was observed whereas some others (notably Bulgaria, Poland and Romania) had a surplus. In the late 1970s and the 1980s this led to large flows of workers between the member-states of COMECON/CMEA, an economic organisation that comprised the countries of the ex-Soviet bloc (Okólski 1992).

<sup>8</sup> These authors argued, by analogy, that since such an outflow in earlier periods was a precondition for the accelerated development of first Western and Northern Europe and then Southern Europe, it should also take place in Central and Eastern European countries.

<sup>9</sup> A great part of that unemployment had its roots in the policy of full employment which belonged to the priorities of communist modernisation. Such a policy encouraged the enterprises to labour hoarding by enterprises – i.e., maximising the number of employees instead of increasing labour productivity. This resulted in a ‘colossal wastefulness of human capital’ (Socha and Sztanderska 1993: 132).

<sup>10</sup> It should be remembered that earlier European mass emigrations (especially at the turn of the nineteenth century) were a reaction to accelerated population growth.

<sup>11</sup> Probably the most comprehensive (albeit not identical) scope of the migration transition is present in works of Hein de Haas (2010) and Ronald Skeldon (2012).

<sup>12</sup> In Zelinsky’s terminology, a ‘vital revolution’ signifies a revolutionary population increase.

<sup>13</sup> It would seem that Chesnais was not familiar with Zelinsky’s theory (which was published in the *Geographical Review*, a specialist journal for geographers). What is especially characteristic of Chesnais’s approach is, first, his focus on emigration and immigration – that is, international flows (and his omission of other types of mobility) and, second, his association of these flows with mortality and childbearing changes in a historical and social context that was specific to Europe.

<sup>14</sup> It should be stressed, however, that both concepts – the population and migration cycles – include a predictive component, in keeping with which, in reality, the final stage (in particular of the migration cycle) has not yet been fulfilled. While empirical representation of the population cycle has been the subject of many scientific works, the most notably of Chesnais’ seminal 1986 monograph, very few have been devoted to the migration cycle. Among the latter, Fassmann and Reeger (2012) seem to adequately reflect the historical experience of several European populations.

<sup>15</sup> Moreover, the strength with which these ‘effects’ manifest themselves depends, according to Arango, on two factors that differentiate the process of migration transition. The first is the phenomenon’s degree of delay in a given country, which affects what patterns of transition are adopted or ‘imitated’ from the ‘forerunners’, and the second is the complex interplay of structural characteristics of the country, which are often rooted in its history.

<sup>16</sup> A few countries have departed from the patterns observed in a given region – in the north and west of Europe these were Finland and Ireland, in Southern Europe Greece and, in Eastern Europe, the former Yugoslavia to some degree.

<sup>17</sup> The lifting of administrative obstacles to the Polish population travelling abroad in 1989 ensured a huge outflow of people which, however, predominantly took the form of circular mobility or irregular migration. The reason for the negligible flows of long-term migrants until 2004 was the retention of restrictions concerning the length of sojourn and access to the labour market in destination countries. In fact, in some of them, the regular migration from Poland diminished as a result of the cessation of the ‘privileged’ treatment of Polish migrants who, in earlier times, were perceived as victims of a communist regime. It was only Poland’s accession to the European Union and, especially, the termination of restrictive labour-market-related ‘transitory’ measures, which fundamentally changed this situation.

<sup>18</sup> In fact, on 1 May 2004, only three EU destination states – Ireland, Sweden and the UK – lifted migration- (and employment-) related restrictions, although soon after, all other EU states, EEA states and Switzerland liberalised the rules of entry and access to the labour market for Polish citizens.

<sup>19</sup> The project entitled '*Niezakończone przejście migracyjne a starzenie się ludności w Polsce*' [*The Uncompleted Migration Transition and Population Ageing in Poland*] (acronym: Mig/Ageing) was carried out in 2013–2018 by the team from the Centre for Migration Research at the University of Warsaw. Funding was provided by the National Science Center within the framework of the Maestro programme.

<sup>20</sup> See Grabowska-Lusińska and Okólski 2009 for a discussion of the fact that the increased migration from Poland in the first years after EU accession may already be the 'last emigration'.

<sup>21</sup> Changes in the other two migration flows (the return of Poles and outflow of foreigners) were expected to be relatively smaller.

<sup>22</sup> The data for 2020 indicate that, despite a decrease in both emigration and immigration – according to 'permanent residence' registers – the net migration remained positive. No data on long-term migration in 2020 were available.

<sup>23</sup> An employer declaration to give a job to a specific foreign citizen is a simplified way for foreigners to get access to Poland's labour market. No work permit is needed in such a case. The permissible length of employment, however, is limited to 6 months over any 12-month period. Foreigners from selected countries (Armenia, Belarus, Georgia, Moldova, Russia and Ukraine) can benefit from this form of employment.

<sup>24</sup> At the time of writing this article the numbers of first residence permits in 2020 had already been published by Eurostat. Although in Poland (as in the EU as a whole) the respective number decreased (compared to 2019), it was still by far the highest among all EU countries and constituted 26.6 per cent of all permits (cf. [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Residence\\_permits\\_-\\_statistics\\_on\\_first\\_permits\\_issued\\_during\\_the\\_year#First\\_residence\\_permits\\_.E2.80.94\\_an\\_overview](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Residence_permits_-_statistics_on_first_permits_issued_during_the_year#First_residence_permits_.E2.80.94_an_overview); accessed: 28 December 2021).


<sup>25</sup> Cf. <https://stat.gov.pl/statystyki-eksperymentalne/kapital-ludzki/populacja-cudzoziemcow-w-polsce-w-czasie-covid-19,12,1.html> (accessed: 28 December 2021).

<sup>26</sup> Cf. <https://forsal.pl/praca/aktualnosci/artykuly/8219519,zus-rosnie-liczba-ubezpieczonych-cudzoziemcow.html> (accessed: 28 December 2021).

<sup>27</sup> Cf. <https://www.zus.pl/documents/10182/2322024/Cudzoziemcy+w+polskim+systemie+ubezpiecze%C5%84+spo%C5%82ecznych.pdf> (accessed: 28 December 2021).

<sup>28</sup> See Grabowska-Lusińska and Okólski's 2009 book *Emigracja ostatnia? (Last Emigration?)*, which presents a comprehensive account of the massive post-accession outflow of people from Poland.

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## Conflict of interest statement

No conflict of interest was reported by the author.

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